PRISM SALESPRO

CUSTOMER RELATIONSHIP MANAGEMENT

USER MANUAL

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Getting Started..

New to *Prism SalesPRO* CRM?

Follow these steps to sail smoothly..

1. **Free Trail**
2. **Login with the credentials.**
3. **Configure your Homepage as per your needs.**
4. **Setup Organization details.**
5. **Choose Modules**
6. **Modify the dropdown fields.**
7. **Configure fields**
8. **Set up Users**.
9. **Import existing data**.

Discover *Prism SalesPRO's* **Modules** & **Settings**.

MODULES.

1. **Leads**

Lead is an unqualified customer; with systematic follow ups and earnest efforts, you can identify prospects.

2. **Contacts**

Contact is a qualified sales lead. Contacts also represent the people that are conducting business with you.

3. **Organizations**

Organization represents a company or an institution that has multiple employees associated with it.

4. **Opportunities**

Opportunities provide strategy to follow up prospective customers who are likely to successfully finish the sale.

5. **Invoice**

Invoice is a non negotiable itemized statement issued for the Products and Services rendered to the customer.

6. **Quotes**

Quote is a formal statement issued by a seller to the prospective buyer upon inquiry or request for a quotation.

7. **Sales Orders**

Sales Order is used to track all the products/services that should be manufactured or shipped to customers

8. **Purchase Orders**

Purchase order is a legal document handled over to vendor to purchase Products or Services.

9. **Home**

Home page widgets provide graphical representation of current status and key performance indicators.

10. **Reports**

Reports provide your sales team the ability to extract only data relevant to them from thousands of records.

11. **Campaigns**

Campaigns offer your marketing team the ability to schedule and execute mass marketing campaigns.

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

12. Projects

Project is a planned work that involves specific goals, start date and target end date, budgets, progress etc.

13. Products

Products represent stock of goods in inventory. Products can be procured from suppliers or rendered to customers

14. Services

Services refer to the free or paid assistance you would offer to benefit your customers.

15. Price Books

Price Books gives you the ability to attribute different prices for products in your inventory

16. Tickets

Trouble Tickets, also called as Cases, are post-sales support requests generated by your customers.

17. Assets

Assets help your support center to audit individual product items, and cases resolved upon them.

18. Service Contracts

Service Contract is a negotiated agreement to offer service to products procured to your customers.

19. Vendors

Vendor is a person or organization that supplies Products or Services to your company.

20. Calendar

Calendar module gives you the ability to schedule, share, track and follow-up events and to-dos

21. Documents

Documents are internal or external files you upload and save in your *Prism SalesPRO CRM* account

22. Recycle Bin

Recycle Bin acts like an archive for all deleted records and helps you restore them when required.

SETTINGS

1. Users

Users represent people that will be able to log into *Prism SalesPRO* and access records according to the permissions defined to them.

2. Profiles

Profiles are used to control actions that users can perform on records, and restrict their access to fields, modules and features.

3. Roles

Roles are used to create user hierarchy. User's position in role hierarchy will decide which of the records he/she can access.

4. Sharing Rules

Sharing Rules is used to configure data sharing rules across users in role hierarchy.

5. Groups

Group is combination of multiple users, roles and groups to manage common set of records.

6. Edit Fields

Layout Editor allows you to add new custom fields, re-arrange fields, edit field properties, and move fields inside and across blocks.

7. Module Manager

Module Manager helps you to enable, disable and configure the settings for existing modules, and import new modules.

8. Picklist Editor

Picklist is a drop-down field with list of options available, within which, only one option can be selected.

9. Picklist Dependency Setup

Picklist Dependency setup helps you to select values in target picklist field more accurately depending upon values in source picklist fields.

10. Menu Editor

Menu Editor helps you to place most frequently accessed modules on Menu bar. You can also rearrange them according to your requirements

11 .Email Templates

Email Templates helps you to create customized email templates and select them while sending out emails from your *Prism SalesPRO CRM* account

12. Company Details

Company Details enables you to personalize your *Prism SalesPRO CRM* by uploading your company logo and details. The information is used while generating Invoices, Quotes, Sales Orders and Purchase Orders

13.Tax Calculations

Tax Calculations enables you to manage national and international taxes while generating Invoices, Quotes, Sales Orders and Purchase Orders

14.Inventory Terms and Conditions

This feature enables you to define inventory terms and conditions in the form of text that is populated in Invoices, Sales Orders, Purchase Orders and Quotes.

15. Announcements

Announcements, like message boards, are used to convey your message to users across *Prism SalesPRO CRM*.

16. Currencies

This feature enables you to configure national and international currencies to help you in dealing business operations with your customers around the globe.

17. Customize Record Numbering

This feature helps you to customize numbering of records across different modules in *Prism SalesPRO CRM* according to your requirements.

18. Workflows

Workflows streamline your business by automating operations like sending emails, creating activities, updating fields, etc.

19. Customer Portal

The self-service channel offers your customers the ability to generate tickets and refer to faqs. You can also share Documents, Products, Projects, Invoices, Quotes etc

21. Webforms

Create and integrate webforms in your website to capture website visitors as lead records in *Prism SalesPRO*

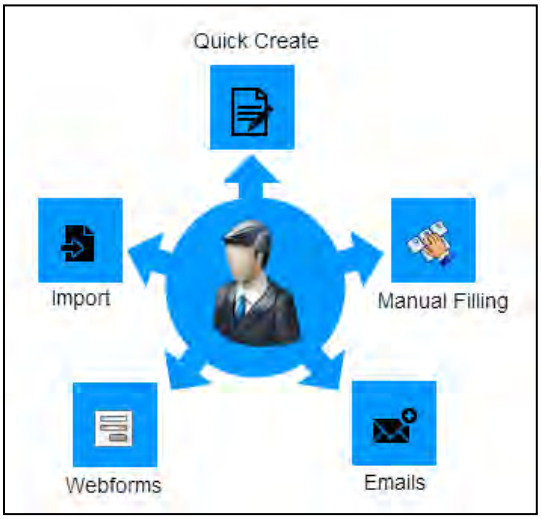
22. Account Settings.

Manage your account's password, time zone, themes etc. Through "My Preferences".

1. Lead Module

Creating a lead:

In CRM, Lead is an unqualified customer; with systematic follow ups and earnest efforts, you can identify potential prospects. Generating Leads is supposedly the first step of Sales Process in CRM. A Lead record maintains information of a person, and the company he is associated with. You might generate Leads from trade shows, purchase lists, advertisements, websites, business cards, or through a referral. The responsibility of sales agents is to introduce Leads into the system, organize, filter and qualify the prospects. In B2B model, lead represents a company where as in B2C model, lead represents a person.



Lead generation methods in *Prism SalesPRO CRM*

a. Entering Leads Manually

You can enter lead details manually from Leads Module. This might come handy if you will have to enter Lead details individually.
Follow few simple steps to create Leads manually

1. Click **All** drop-down
2. Click **Leads**
3. Click **Add Record** button
4. In the create lead view, fill necessary fields
5. Click **Save**

b. Quick Create

Quick create helps you to create lead records with basic details. This might be helpful if you are running out of time.
Follow few simple steps to create lead records through Quick create

1. Click + plus icon in top right corner
2. Click **Lead**
3. In the create lead view, fill necessary fields
4. Click **Save**

c. Import existing lead

If you have your data in .csv or .vcf format, you can import thousands of records instantly and effectively. *Prism SalesPRO CRM* supports importing data into different modules including Leads, Contacts, Organizations, Opportunities, etc

Check List

1.Mandatory Fields
Make sure your file addresses all mandatory fields. For instance, **Last Name** and **Company** fields are mandatory in Leads module. You cannot proceed with importing until or unless you have a value within these fields of your .csv file. If the value of mandatory fields is empty, they will be set to '????'.

2.File Size
Make sure the file to be imported do not exceed 5 MB size

3.Permissions
Admin users can disable import access to non-admin users from Profile level. If you can't find the Import option, you should contact your Administrator to enable import permission for your profile

Getting Started

This tutorial will walk you through different steps involved in importing records into your *Prism SalesPRO CRM* account. The entire process is simple and straightforward.

Follow few simple steps to import data into *Prism SalesPRO CRM*

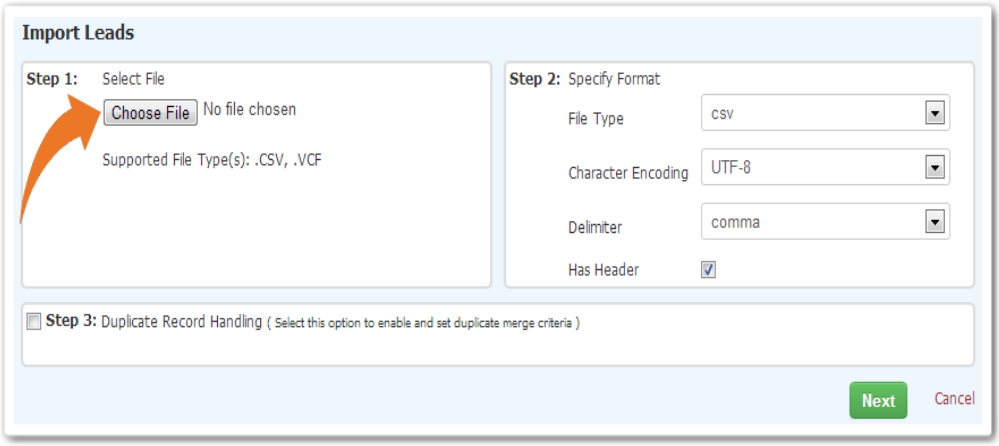
1. Click [Module] tab. Eg: Leads, Contacts, etc
2. Click **Actions** > **Import**

Step 1: Select File

In the first step of importing process, you'll need to browse and upload your import file from your machine.

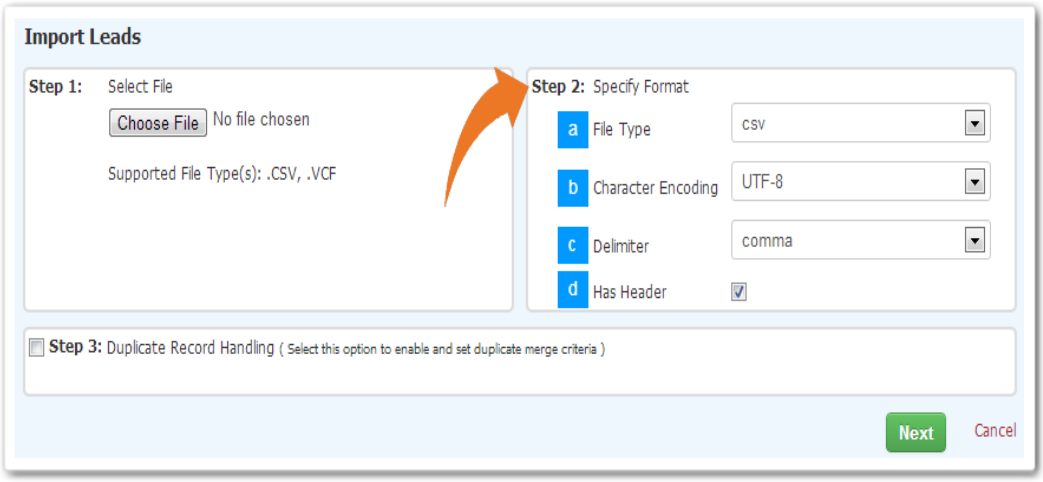
Here's how to select your.csv file

Click on the **Choose File** button, browse for desired file that is to be imported. Csv and vcf are the two file formats currently supported.



Step 2: Specify Format

In the second step of importing process, you'll need to specify import file properties. The details of each property are explained below.

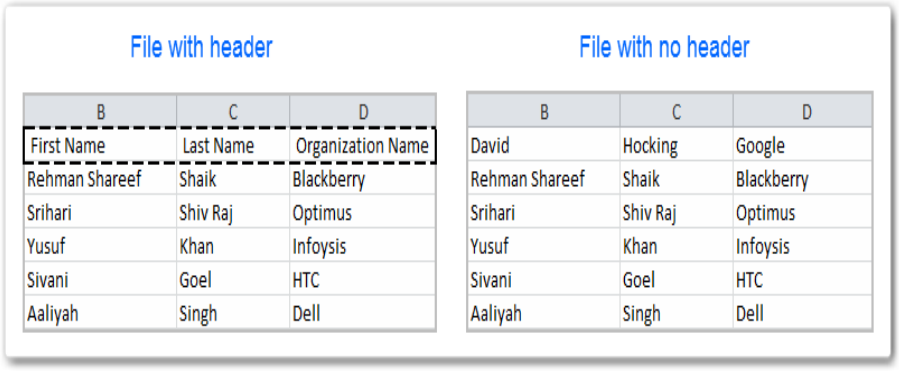


a. File Type : *Prism SalesPRO*supports two different file types namely: .csv and .vcf. Select the appropriate value from the **File Type** dropdown that describes the format of the file you've selected in Step:1. For instance, if you've uploaded .csv file, select .csv from **File Type** field.

b. Character Encoding : Make sure you select the right character set in which your import file has been encoded. You'll need to select right encoding of the file irrespective of the file contents.

c. Delimiter : *Prism SalesPRO CRM* supports comma (,) and semicolon(;) as field delimiters. The fields in your .csv file are recognized only if they are separated with delimiters. More often, in a csv file, fields are separated with commas(,).

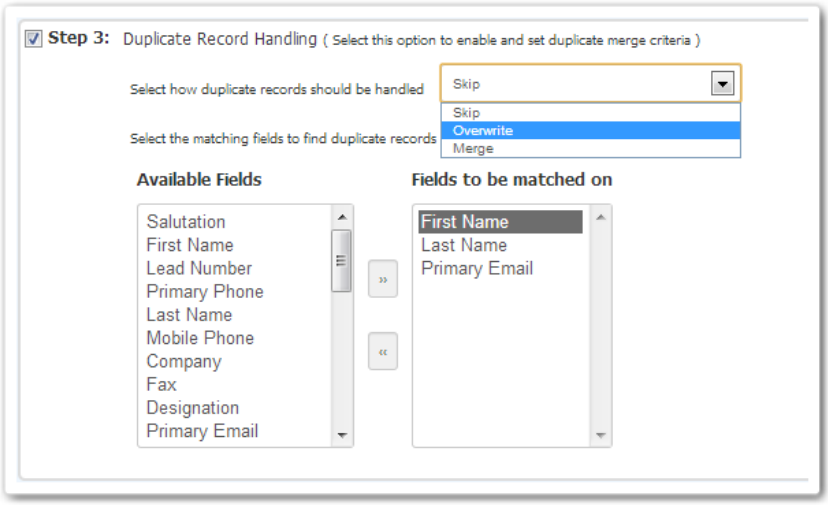
d. Header : While importing, the header of your .csv file is compared with fields in *Prism SalesPRO CRM*. Having a header makes it easy for you to map fields. Click on **Has Header**checkbox if your file has a header. First row of your csv file is considered as a header. Please make sure that you uncheck the **Has Header** field if your file doesn't have a header.



B	C	D
First Name	Last Name	Organization Name
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

B	C	D
David	Hocking	Google
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

Step 3: Duplicate Record Handling
This is an optional step and comes into play if you would enable the checkbox in Step-3 of the import process. This option will help you in tracing out duplicate records. You can also configure the actions to be performed on duplicate records: skip, overwrite and merge. And finally, select desired fields for duplicate lookup by moving fields from the list of **Available Fields** to **Fields to be matched on** by using the right and left arrows.



Following actions can be performed on duplicate records

Skip : After import, duplicate records are identified based on fields criteria. If your CRM and .csv file have records in common, to avoid redundant data, duplicate records in .csv file are not imported into *Prism SalesPRO CRM*.

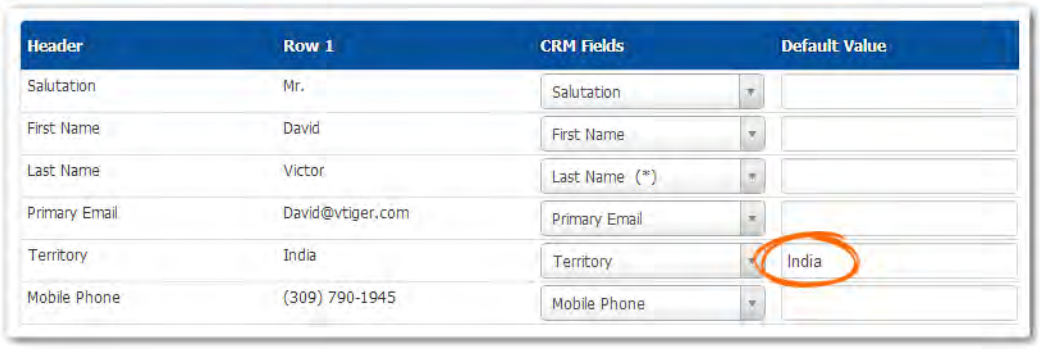
Overwrite :After import, duplicate records are identified based on fields criteria. If your CRM and .csv file

have records in common, to avoid redundant data, the records in .csv file are imported and replaced with records in *Prism SalesPRO CRM*.

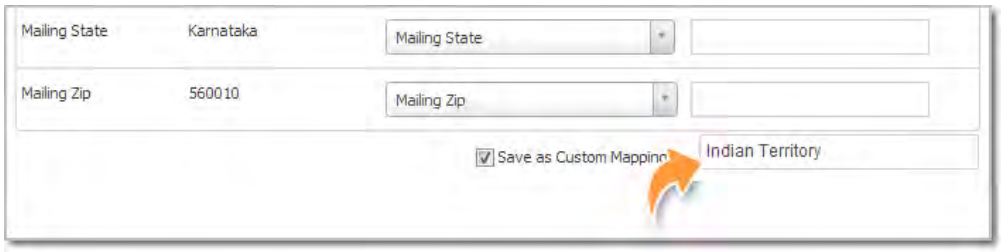
Merge : After import, duplicate records are identified based on fields criteria. Merge, unlike overwrite and skip, checks for duplicate records first and then captures only useful information from your .csv file and updates it in your CRM.

Step 4: Map CRM Fields
In the final step of import process, you will need to map import file Header/Column to fields in *Prism SalesPRO CRM*. Fields will be automatically mapped if your csv file's header matches with *Prism SalesPRO CRM* field label. Here's a list of before you get started.

You can provide default values for mapping fields which will be picked up in case if the value for any field in file will be empty.



Also, frequently used mappings can be saved and reused.

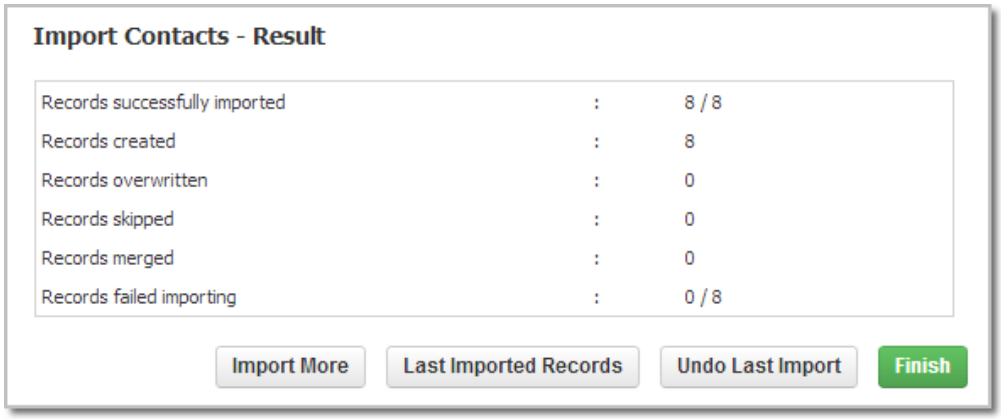


Saved mappings will be accessible across all users. You can delete the saved mappings by clicking on Trash icon.

After successfully mapping fields, click **Import** button.

Import Results

After successfully importing records into *Prism SalesPRO CRM*, the import results are displayed in tabular format



- **Import More**

  Lets you start all new import again

- **Last Imported Records**

  Displays records imported lately with the help of paging support.

- **Undo Last Import**

  Deletes all records that are created during the last import session. Reference records related to other modules will not be deleted.

d. Capturing leads from website(s).

Webforms

Your website visitors are no strangers anymore. Instead, they will be Lead records in your *Prism SalesPRO CRM*. Generate webform and copy it to your website; As a result, your user's information will be captured as leads in *Prism SalesPRO CRM*. You can create a new form or enable a existing form in your website to capture Leads into the system. This might interest your sales and marketing team members as it plays an important role in lead generation.

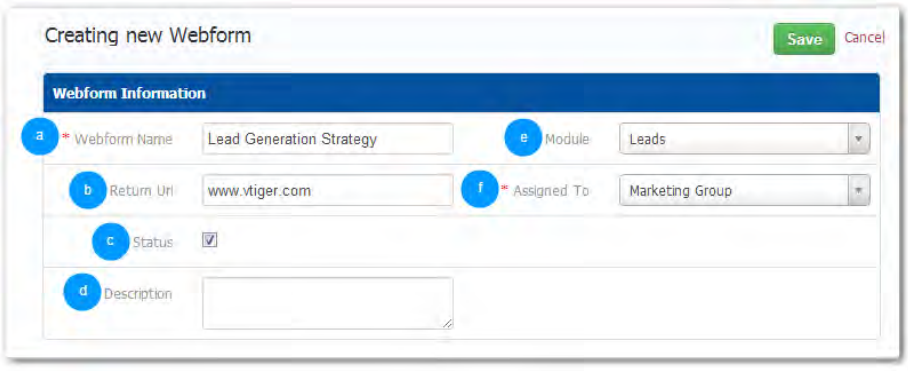
Creating Webforms

A website with a webform is said to be easiest way to implement lead capturing strategy. To create one for yourself, you'll need to fill in few fields — fields that are displayed in the webform and fields that are hidden intentionally.

Follow few simple steps to create a Webform

1. Click gear icon icon in the top right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Webforms**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click **Add Record** button

You'll be navigated to **Creating new webform** view. You'll find fields in two different blocks in this view. The fields in 'Webform Information' block are listed below.



a. **Webform Name** : Provide an unique Webform name. This is just for your reference.

b. **Return URL** : Provide a URL to which your users should be navigated after successfully submitting details.

c. **Status** : Click on checkbox to make the webform active. You can disable the check-box if you decide not to use the webform.

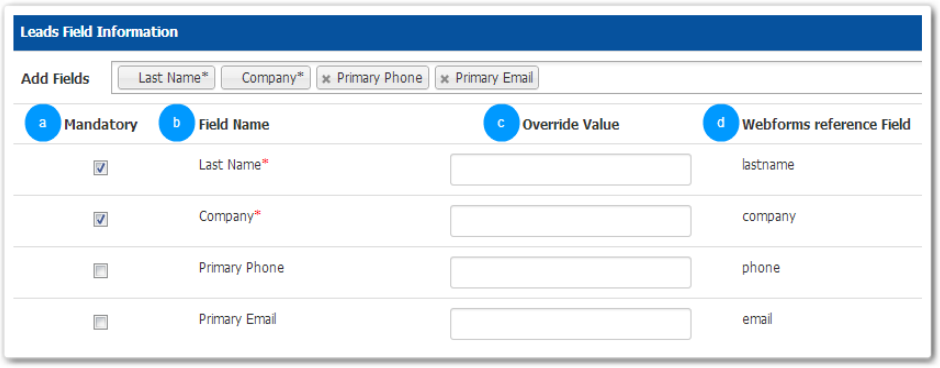
d. **Description** : To provide more details about webform. This is just for your reference.

e. **Module** : Select a module in which records should be captured. *Prism SalesPRO*only supports capturing leads.

f. **Assigned to** : Select an user or a group to whom records should be assigned.

The fields you'd select in 'Lead Field Information' block will be displayed on your webform when you integrate it in your website, unless you've removed the code from the HTML file. You can select fields — to be displayed on your webform — by clicking on text space provided next to **Add Fields** field.

Notes! Mandatory fields are automatically selected.



a. **Mandatory** : Enable the checkbox to make corresponding field mandatory for the users to fill in

b. **Field Name** : Fields selected in **Add Fields** field are displayed in this column

c. **Override Value** : The value you would provide here will override the value entered by users

d. **Webforms Reference Field** : This will come handy while mapping with other CMS like Wordpress. The field name must match the Webform Reference Field

Notes!
1.If you would like to map existing forms with PrismSalesPro, the field names in your existing forms should be changed according to the Webforms Reference Field name. The values will be found in detail view of your webform record in *Prism SalesPRO CRM*.
For instance, First Name will be termed as firstname in Webforms reference Field.

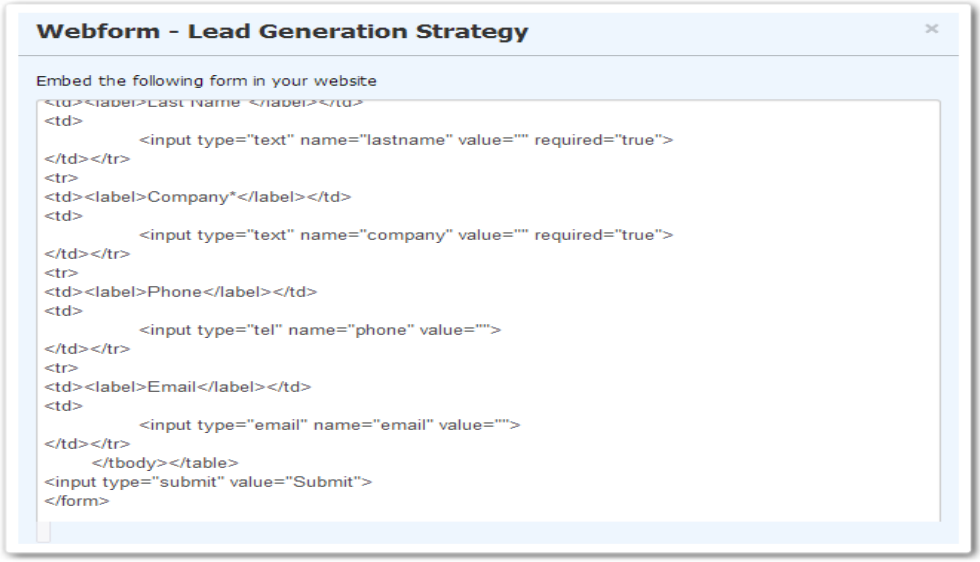
6. Now click **Save** to update changes. After save, two fields are automatically updated in the list view.

1. Public Id : The value in this field is used to establish connection between the existing form and *Prism SalesPRO*forms

2. Post URL : The value in this field specifies the location of the module where information should be submitted

Generating ready-to-use HTML content

After successfully creating a webform, you will be navigated to the detail view of Webform. Click on **Show Form** button and copy the HTML content to your website.



Done! Your website visitors are now gonna be Lead records in *Prism SalesPRO CRM*.

Integrating Existing Webforms

You might be getting your work done with different webforms on your website already. To integrate your existing webforms with PrismSalesPro, you'll need to establish a relationship between your existing forms and PrismSalesPro. This is where Public Id and Post URL will come in handy. They are automatically generated after you would successfully create a webform in PrismSalesPro. You can find them in detail view of your webform record

Public Id

Builds the relationship between the existing form and PrismSalesPro

```
<input type="hidden" name="publicid" value="Paste Your Public Id Here"></input>
```

Post URL

Specifies the location of the module where information should be submitted

```
<form name="Place Your Webform Name Here" action="Paste Your Post URL Here" method="post" accept-charset="utf-8">
```

Modifying field names in your existing Webform

Your existing form might have different field names. The names should be changed according to the Webforms Reference Field name. The values will be found in detail view of your webform record in *Prism SalesPRO CRM*.
For instance, First Name will be termed as firstname in Webforms reference Field.

Integrating Wordpress Forms

This feature enables you to integrate Wordpress forms with *Prism SalesPRO*to get leads right away into your *Prism SalesPRO CRM* account.

Step 1: Mapping the fields

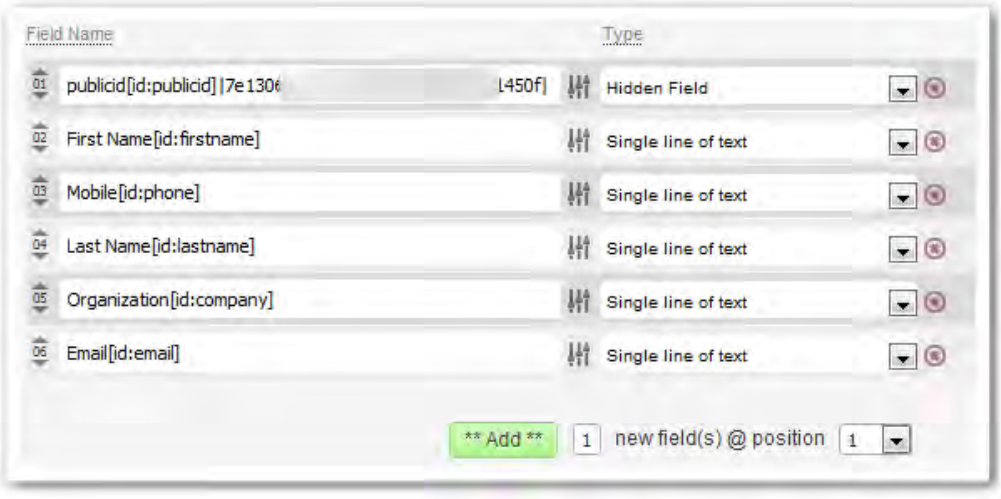
The process of mapping fields is made simple and straightforward. You'll need to map fields according to webforms reference fields as shown in the picture below.
Follow few simple steps to map fields

Install cforms in your wordpress account.

Create a form, Add fields and set them according to *Prism SalesPRO CRM* Webform Reference Fields.

Include Public Id along with the fields.

For instance, If I have fields like First Name, Mobile, Last Name, Organization and Email in my wordpress form. The Webforms reference fields will be firstname, phone, lastname, company and email respectively.


Field Name
Type
01 publicid[id:publicid]|7e130 l450f] Hidden Field
02 First Name[id:firstname] Single line of text
03 Mobile[id:phone] Single line of text
04 Last Name[id:lastname] Single line of text
05 Organization[id:company] Single line of text
06 Email[id:email] Single line of text
** Add ** 1 new field(s) @ position 1

Step 2: Provide Post URL

Under the **Core Form Admin / Email Options**, enable the following check-boxes

1. *Use custom input field NAMES & ID's*.
2. *Send form data to an alternative page*, and paste your Post URL in the text field provided.
3. Click **Save and Update form Settings**.

Notes! Public Id and Post URL will be found in the detail view of your webform record in *Prism SalesPRO CRM*.

Attention!
1. Publicid should be hidden while creating a cform.
2. Webform reference field should be copied from *Prism SalesPRO*webform to cforms.
3. The Webform reference field for Public Id field should be *publicid*.
4. The general syntax during the field mapping is

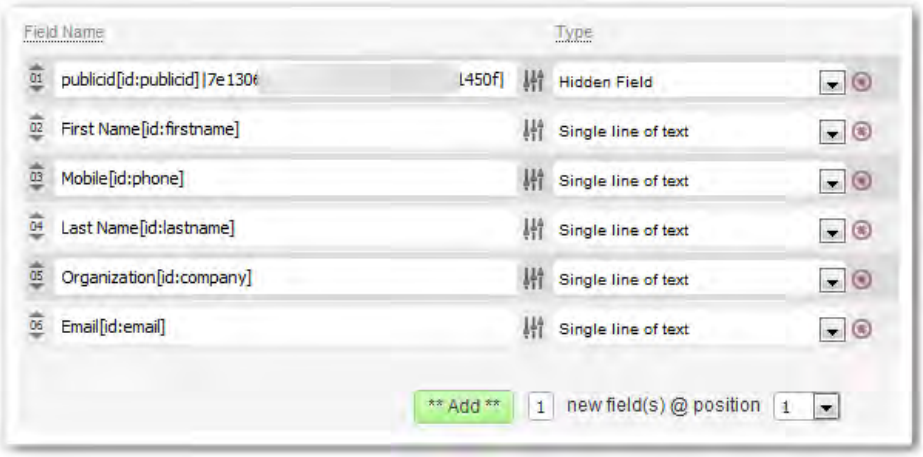
Your_Desired_Field_Name[id:paste your webforms reference field name]

How it works

After setting the things up, you have to create a post to see the wordpress webform. You can embed the webform in your website and capture the Leads into *Prism SalesPRO CRM*, automatically.

1. Click Posts > Add New(This can be found on your wordpress side bar)
2. Click cforms Icon
3. Select your form and click insert.
4. Click on Publish

If you would click on **view post**, you should be able to see your form. Your website visitors are no strangers anymore. They will be your Lead records instead



Step 2: Provide Post URL

Under the **Core Form Admin / Email Options**, enable the following check-boxes

Use custom input field NAMES & ID's.

Send form data to an alternative page, and paste your Post URL in the text field provided.

Click **Save and Update form Settings**.

Notes! Public Id and Post URL will be found in the detail view of your webform record in *Prism SalesPRO CRM*.

Attention!

Publicid should be hidden while creating a cform.

Webform reference field should be copied from *Prism SalesPRO*webform to cforms.

The Webform reference field for Public Id field should be *publicid*.

The general syntax during the field mapping is

Your_Desired_Field_Name[id:paste your webforms reference field name]

How it works

After setting the things up, you have to create a post to see the wordpress webform. You can embed the webform in your website and capture the Leads into *Prism SalesPRO CRM*, automatically.

Click Posts > Add New(This can be found on your wordpress side bar)

Click cforms Icon

Select your form and click insert.

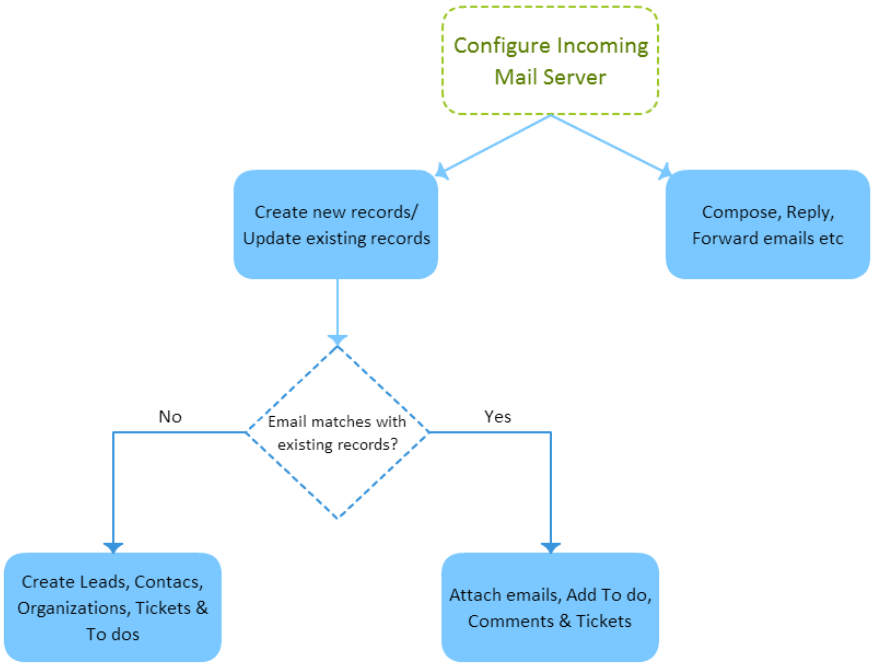
Click on Publish

If you would click on **view post**, you should be able to see your form. Your website visitors are no strangers anymore. They will be your Lead records instead.

e. Creating lead record from your email

Mail Manager

Mail Manager is an integrated email client that allows users to perform CRM related actions on incoming email. It helps you create Leads, Contacts, Organizations, Trouble Tickets and To Dos from the emails that you receive in your inbox. Should sender's email id match with a record in *Prism SalesPRO CRM*, you can perform more actions like, Attaching email, Adding To do, Comment and Ticket. Additionally, you can manage composing, replying, forwarding emails etc.

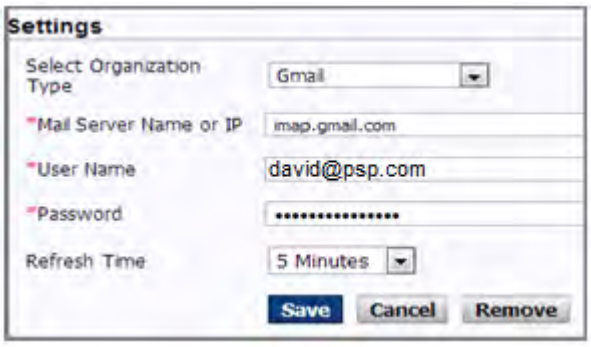

Configure Incoming Mail Server
Create new records/ Update existing records
Compose, Reply, Forward emails etc
Email matches with existing records?
No
Yes
Create Leads, Contacs, Organizations, Tickets & To dos
Attach emails, Add To do, Comments & Tickets

Step 1: Configuring your incoming mail server

Select your email provider to receive all emails right in your *Prism SalesPRO CRM*. If your email provider is either Gmail, Yahoo, or Fastmail, then mail server name will be automatically populated. Otherwise, you will have to provide server name or IP address manually.
Follow few simple instructions to configure email provider:

1. Click **Mail Manager** tab. You will be navigated to **Settings**
2. Under Settings tab, Select your email provider

3. Mail Server Name will be automatically populated for Gmail, Yahoo and Fast mail
4. Provide your user name and password
5. Provide Refresh time
6. Click **Save**

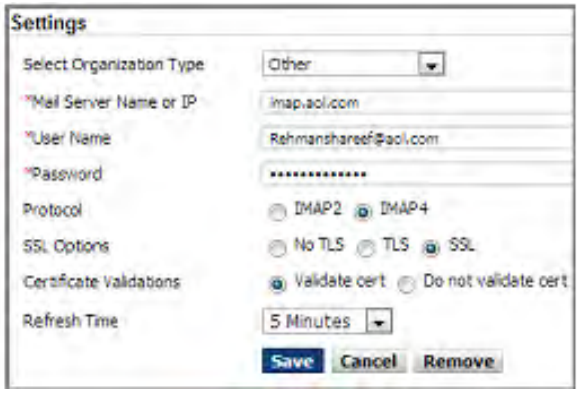


Note!
1.If your mailbox is not configured yet, you'll be navigated to **Settings**. In case if you'r mailbox is already configured, you can find **Settings** in the left.

If your email provider name is not listed (Eg: Aol), click on **Select Organization Type** drop-down and select **Other**

Click **Settings** tab, click **Select Organization Type** drop-down and select **Other**

1. Provide Mail Server Name or IP (Eg: imap.aol.com for Aol)
2. Provide your User name and Password
3. Select protocol supported by your email provider
4. Enable SSL option supported by your email provider
5. Provide validate certificate if you have any
6. Provide Refresh Time
7. Click Save



Attention! *Prism SalesPRO CRM* only supports IMAP. POP3 is not supported yet.

Step 2: Creating new records from your emails

If the email you receive doesn't match the email field of existing records in your *Prism SalesPRO CRM*, you can create either Leads, Contacts, Organizations, or a Trouble Tickets from within your email.

Follow few simple instructions to create records from within your email

1. Click on your email to open
2. On the right side of page, under **Related Records**, look up is made basing upon email id
3. If email does't match, click on **Actions** drop-down
4. Click on either Add Leads or Add Organizations or Add Contacts or Add Tickets
5. Modify values in the pop up, if necessary
6. Click **Save**

Step 3: Updating existing record from within your email

If email matches with the existing record in your *Prism SalesPRO CRM*, you can associate a To do, Trouble Ticket, add a Comment, or attach an email to the record.

Follow few simple instructions to update record from within your email

1. Click on your email to open
2. On the right side of page, under **Related Records**, look up is made basing upon email id
3. If email matches, click on **Actions** drop-down
4. Click on either select Add To do, Add Trouble Ticket, Add Comment or Attach Email
5. Modify values in the pop up, if necessary
6. Click **Save**

Step: 4 More Actions

Apart from managing operations on incoming emails, you can perform more operations like sending out emails, replying and forwarding emails, searching, grouping all emails sent from *Prism SalesPRO*under different folders, saving drafts etc. Custom filters in your personal email account will also be displayed. You can move emails in and across those folders.

Sending out emails

Follow few simple instructions to send out emails from Mail Manager

1. Click **Mail Manager** tab
2. Click **Compose**
3. Enter recipient's email in **To Field**. Click on folder next to **To** field to search for email ids across records in *Prism SalesPRO CRM*
4. You can also attach files to your email. Click **Upload** to attach files from your machine, click **Select Documents** to attach files saved in your **Documents** module.
5. Click **Save Now** to save your email in **Drafts**. You can send out those emails later.
6. Click **Select Email Template** to populate previously saved email templates

7. You can also have rich text, images, tables etc in email body
8. After composing email, click **Send**

Attention!
You will have to first configure your Outgoing Server before sending out emails from Mail Manager Emails will be sent from your personal email id in **My Preferences**.

Sent Mails

All the emails that will be transferred from *Prism SalesPRO CRM* will be displayed under **Send Mails**. It groups emails sent to Leads, Contacts, Organizations and Users under different folders.

Attention!
The emails displayed in **Sent Mails** will not necessarily be sent from Mail Manager. Emails that were sent through any email sending channel in *Prism SalesPRO CRM* will be displayed in **Sent Mails**.

2. Contacts

What is a Contact?

Contact can be represented as a qualified sales lead. Contacts differentiate qualified customers from the huge list of unqualified customers. Contacts also represent the people that are conducting business with you. They could be acting individually or representing an Organization.

Creating Contacts Manually

You can enter Contact details manually from Contacts Module. This might come handy if you will have to enter Contact details individually.
Steps to create Contact records manually

1. In **Contacts** tab, click on **Add Contact** button
2. In the Create Contact view, fill in the Contact details
3. Click **Save**

Quick Create

You can enter basic details of Contact record through Quick create. This might be helpful if you are running out of time.

Steps to create Contact records through Quick create

1. Click (+) Icon on top right corner
2. Click Contact
3. In the Create Contact view, fill in the Contact details
4. Click **Save**

Import existing data

If you have your data in .csv or .vcf format, you can import thousands of records instantly and effectively. *Prism SalesPRO CRM* supports importing data into different modules including Leads, Contacts, Organizations, Opportunities, etc.

Check List

1. **Mandatory Fields**
   Make sure your file addresses all mandatory fields. For instance, **Last Name** and **Company** fields are mandatory in Leads module. You cannot proceed with importing until or unless you have a value within these fields of your .csv file. If the value of mandatory fields is empty, they will be set to '????'.

2. **File Size**

Make sure the file to be imported do not exceed 5 MB size

3. **Permissions**

Admin users can disable import access to non-admin users from Profile level. If you can't find the Import option, you should contact your Administrator to enable import permission for your profile

Getting Started

This tutorial will walk you through different steps involved in importing records into your *Prism SalesPRO CRM* account. The entire process is simple and straightforward.

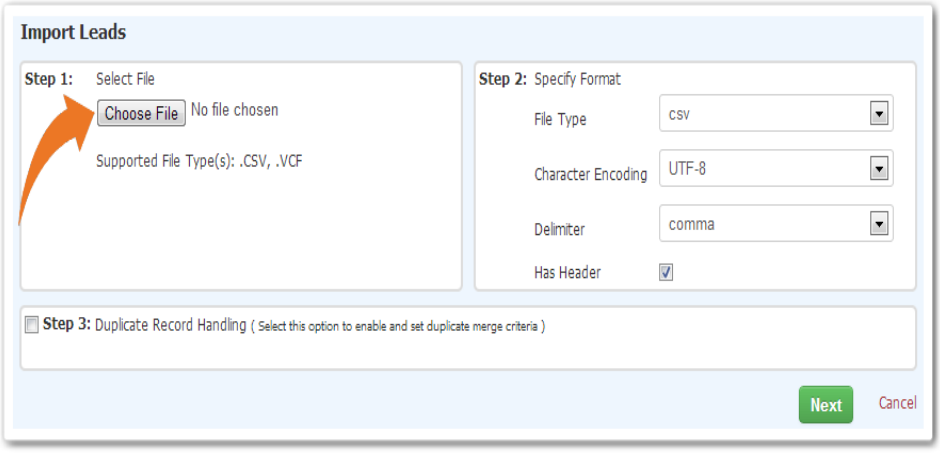
Follow few simple steps to import data into *Prism SalesPRO CRM*

1. Click [Module] tab. Eg: Leads, Contacts, etc
2. Click **Actions** > **Import**

Step 1: Select File

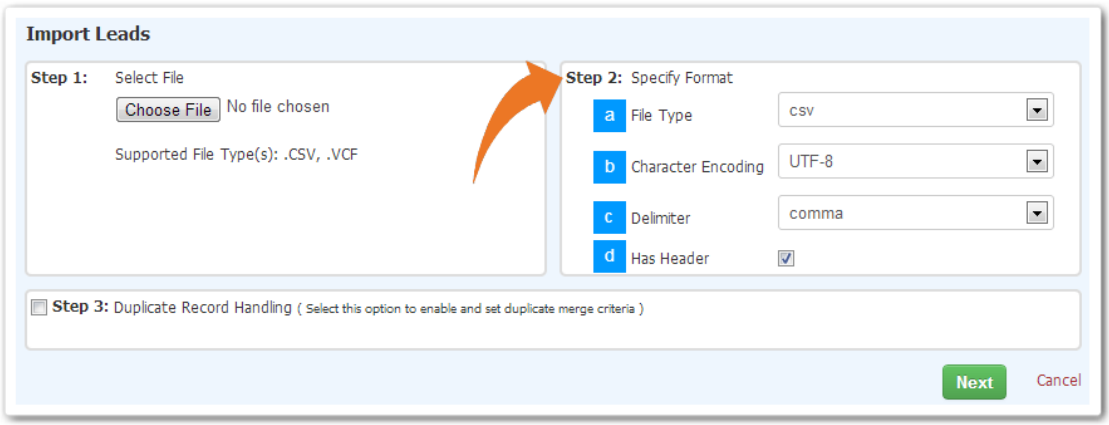
In the first step of importing process, you'll need to browse and upload your import file from your machine.

Here's how to select your.csv file
Click on the **Choose File** button, browse for desired file that is to be imported. Csv and vcf are the two file formats currently supported.



Step 2: Specify Format

In the second step of importing process, you'll need to specify import file properties. The details of each property are explained below.



a. File Type: *Prism SalesPRO*supports two different file types namely: .csv and .vcf. Select the appropriate value from the **File Type** dropdown that describes the format of the file you've selected in Step:1. For instance, if you've uploaded .csv file, select .csv from **File Type** field.

b. Character Encoding: Make sure you select the right character set in which your import file has been encoded. You'll need to select right encoding of the file irrespective of the file contents.

c. Delimiter: *Prism SalesPRO CRM* supports comma (,) and semicolon (;) as field delimiters. The fields in your .csv file are recognized only if they are separated with delimiters. More often, in a csv file, fields are separated with commas (,).

d. Header: While importing, the header of your .csv file is compared with fields in *Prism SalesPRO CRM*. Having a header makes it easy for you to map fields. Click on **Has Header** checkbox if your file has a header. First row of your csv file is considered as a header. Please make sure that you uncheck the **Has Header** field if your file doesn't have a header.

File with header

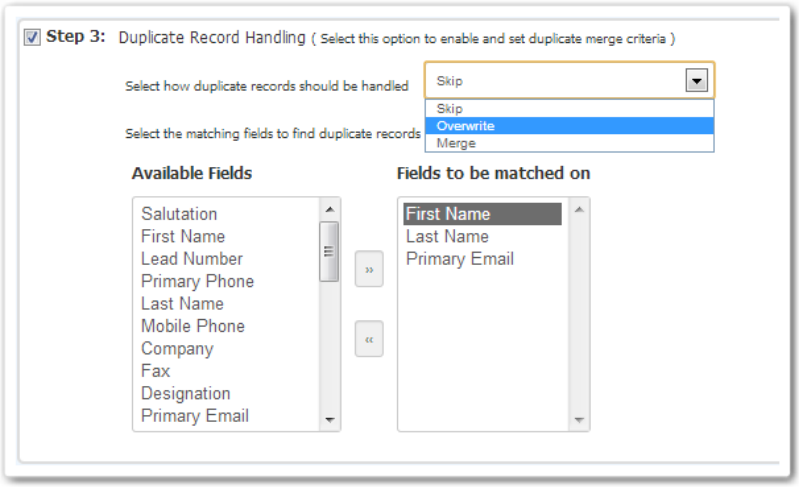
B	C	D
First Name	Last Name	Organization Name
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

File with no header

B	C	D
David	Hocking	Google
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

Step 3: Duplicate Record Handling

This is an optional step and comes into play if you would enable the checkbox in Step-3 of the import process. This option will help you in tracing out duplicate records. You can also configure the actions to be performed on duplicate records: skip, overwrite and merge. And finally, select desired fields for duplicate lookup by moving fields from the list of **Available Fields** to **Fields to be matched on** by using the right and left arrows.



Following actions can be performed on duplicate records

Skip: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, duplicate records in .csv file are not imported into *Prism SalesPRO CRM*.

Overwrite: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, the records in .csv file are imported and replaced with records in *Prism SalesPRO CRM*.

Merge: After import, duplicate records are identified based on fields criteria. Merge, unlike overwrite and skip, checks for duplicate records first and then captures only useful information from your .csv file and updates it in your *Prism SalesPRO CRM*.

Step 4: Map CRM Fields

In the final step of import process, you will need to map import file Header/Column to fields in *Prism SalesPRO CRM*. Fields will be automatically mapped if your csv file's header matches with *Prism SalesPRO CRM* field label.

You can provide default values for mapping fields which will be picked up in case if the value for any field in file will be empty.

Also, frequently used mappings can be saved and reused.

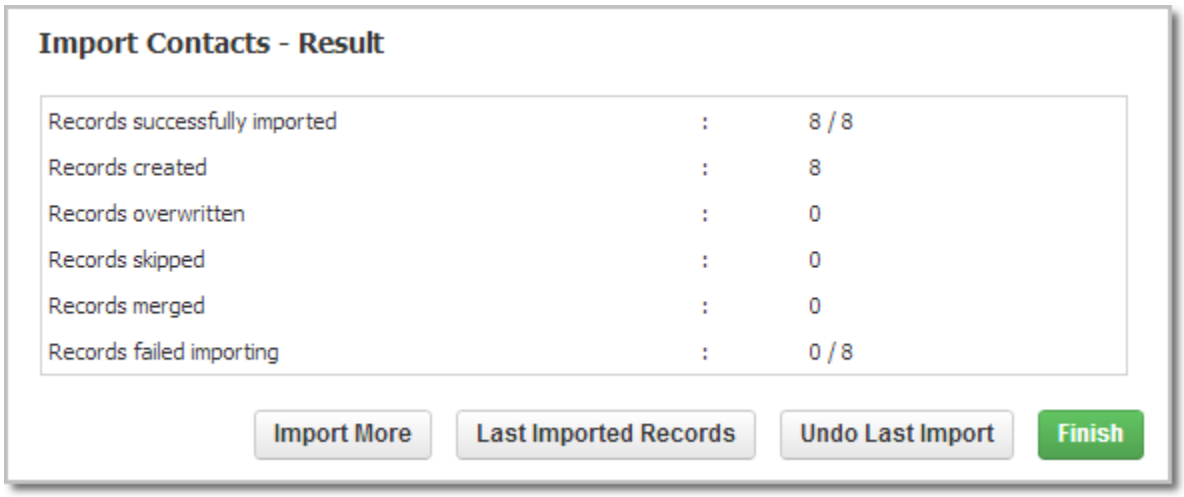
(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

Saved mappings will be accessible across all users. You can delete the saved mappings by clicking on Trash icon.

After successfully mapping fields, click **Import** button.

Import Results

After successfully importing records into *Prism SalesPRO CRM*, the import results are displayed in tabular format



- **Import More**

  Lets you start all new import again

- **Last Imported Records**

  Displays records imported lately with the help of paging support.

- **Undo Last Import**

Deletes all records that are created during the last import session. Reference records related to other modules will not be deleted.

Notifications

Import Scheduled!
If you have more than 1000 records in your file, your import will be scheduled on cron which is configured to run once in every 15 minutes. If you have configured your Outgoing Server and Email id properly, an email notification will be sent to you after successful import

Data Corruption Error

This error shows up when the import is interrupted for various reasons like crashing in between, or canceled by a user etc. This error indicates that the import table still has records to be imported into the system, but all the information related to the import (like mapping, default values, merge criteria) are all lost. So these records can no more be imported and the user needs to clear this data before starting any other import.

Import Locked Error

This error will be displayed if the import has been already been started on the same module by any other user in *Prism SalesPRO CRM*. The details of the module, the user, and the time at which the Import has been locked is detailed within the error message itself.
Import Interrupted Error

If an Admin user is performing import and if a non-admin user tries to start an import on the same module, he will get to see the Import Locked error. If non-admin user is doing import, and Admin user attempts to import on the same module, same time, he can be able to see the status of the current import and he will even have powers to cancel the current import; Consequently, the Import Interrupted Error will be displayed to non-admin user.

Attention!
1.If you would start importing in one particular module, you cannot import records into the same or any other module in *Prism SalesPRO CRM*.
2.If you would trigger import on a particular module, neither you nor any other user in *Prism SalesPRO CRM* can import records into the same module. However, other users can import records into other modules in *Prism SalesPRO CRM*.

Converting Leads

Once a Lead is qualified and determined to be a potential sale, the Lead can be converted to an Opportunity. A Contact record and Organization record will be created simultaneously to store the personal information and company information.
Steps to convert a Lead

1. Click on the Lead record you intend to convert
2. In the detail view, Click **Convert Lead** Button
3. In the convert Lead pop-up, you can modify the existing values and transfer related records.
4. If there is a chance of immediate sale, un-check Opportunity check-box.
5. Click Save

Notes

1. You can transfer related records (Documents, Emails etc) to either Organization or Contacts by selecting the radio button during the Lead Conversion.
2. Lead record will no more be available after Lead Conversion.
3. After conversion, Contact, Organization or Opportunity records cannot be reverted to the previous state.

B2C Model

If you are dealing business only with a Contact, you can remove the mandatory status of Company field in Leads Module and un-check Organization check-box in Lead Conversion pop-up; As a result, only a contact record will be created upon Lead conversion.

Mapping Fields

Prism SalesPRO CRM allows you to map Standard fields and Custom fields before converting a lead to Contact and Organization, or an Opportunity. The field values will be transmitted to the selected target fields. This will ensure that the data will not be lost upon Lead conversion. Standard fields will be automatically mapped but the custom fields should be mapped manually.
Steps to modify the existing fields or map custom fields

1. Click Settings Icon > CRM Settings
2. Click Module Manager
3. Locate Leads and Click Leads Settings Icon (Hammer icon)
4. Click Leads Field Mapping
5. Click Edit button modify existing field settings
6. Click Add Mapping button; Consequently, new set of fields will be added to map custom fields.
7. Select the source field and map it to the target field accordingly.
8. Click Save

Notes

1. Target Field type should be identical to the Source Field type. For instance, If Source Field is a Picklist, the Target Field should also be a Picklist Field.
2. The Target Field size should be greater than or equal to the Source Field.
3. Target Field values should only be mapped once.

Exporting Contacts to External Source

If you ever want your data in the form of a spreadsheet, you can export your Contacts records right away. Steps to export your data

1. Click **Contacts** tab

2. Click **Actions** button > **Export**

3. In the Export Records page, you will find the following options

Click on the radio button to export the records selected in List view	Export selected records
Click on the radio button to export all the records that are on the current list view page	Export data in current page
Click on the radio button to export all records in Contacts module	Export all data

4. Click **Export Contacts** button.

Managing Contacts

List of operations you can perform on records in Contacts Home page

1. Create Custom Filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria

2. Search desired records

3. Click on **Actions** drop-down to perform following operations

Select **Edit** to modify selected record(s)

Select **Delete** to delete selected record(s)

Select **Add Comment** to add a comment on selected record(s)

Select **Send email** to send out emails to selected record(s)

Select **Send SMS** to send out SMS to selected record(s)

4. Click Settings button to perform following operations

Select **Edit Fields** to configure fields and customize the layout of fields through Layout Editor

Select **Edit Workflows** to view / create new Workflows on Contacts module

Select **Edit Picklist values** to modify picklist values through Picklist Editor

List of operations you can perform on detail view of Contact record

1. Click **Edit** to modify existing content
2. Click **Send Email** to send email to existing contact record
3. Click on **More** drop-down to perform following operations on Contact record
    1. Select **Delete** to delete the existing contact record
    2. Select **Duplicate** to clone existing contact record
    3. Select **Add Document** to attach a document to existing contact record
    4. Select **Send SMS** to send out sms to existing contact record.

First Name	Provide the first name of the Contact
Last Name	Provide the Last name of the Contact. This is a mandatory field
Organization Name	Select the Organization that is related to the Contact
Primary Email	Provide email address of the Contact
Date of Birth	Provide date of birth of the Contact
Reports to	Select from the list of Contacts to whom the Contact reports
Email opt out	Select the check-box to remove the contact from mailing list. That means the contact will not be able to receive emails from *Prism SalesPRO CRM* anymore
Assigned to	Select any user(s) to make him/her the owner of Contact record
Portal User	Enable the check-box to grant customer portal access to Contact record

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

Support Start Date	Customer can log into Customer portal from this date
Support End Date	Customer can log into Customer portal until this date

5. Select **Add Event** to schedule a Call or Meeting and Select **Add Task** to schedule a Todo

Fields Information

Information of fields in the Contacts module.

Associating Contacts with Other Records

This will display all-round view of relations of Contacts module with other modules and maintains log of complete history.You can keep track of following details in Contacts module

Comments	To view the Comments related to the Contact record
Updates	To view the modifications done on Contact record
Opportunities	To track the Opportunity records associated with Contact record
Activities	To view or create Events and To-dos on a Contact record
Emails	To view the emails sent to Contact record
Tickets	To view the Trouble Ticket records related to the Contact record
Quotes	To view the Quotes related to the Contact record
Purchase Order	To view the Purchase Orders related to the Contact record
Sales Order	To view the Purchase Orders related to the Contact record
Products	To view the Products related to Contact record. You can have here the products that might interest your customer
Activity History	To view all Events and To-dos that are completed or status changed as **Held**
Documents	To view the documents related to the Contact record
Campaigns	To view the Campaigns related to the Contact record
Invoice	To view the Invoices related to the Contact record

Service Contracts	To view the Service Contracts related to the Contact record
Services	To view the Services related to Contact record. You can have here the Services that might interest your customer
Projects	To view the Projects that are related to the Contact record

3. Organizations

What is an Organization?

Organization represents a company or an institution that has multiple employees associated with it. Contacts, as in employees, can be directly related to an Organization record. Organization need not always be a existing customer. You will track the business deal through Opportunities. If the deal is won, Organization will represent existing customer. If the deal is lost, you can always have archive of dead Organizations in your *Prism SalesPRO CRM* with an intention of having business with them some time in future.

Creating Organizations Manually

You can enter Organization details manually from Organizations Module. This might come handy if you will have to enter Organization details individually.
Steps to create Organization records manually

1. In **Organizations** tab, click on **Add Organization** button
2. In the Create Organization view, fill in the Organization details
3. Click **Save**

Quick Create

You can enter basic details of Organization record through Quick create. This might be helpful if you are running out of time.
Steps to create Organization records through Quick create

1. Click (+) Icon on top right corner
2. Click **Organization**
3. In the Create Organization view, fill in the Organization details
4. Click **Save**

Import existing data

If you have your data in .csv or .vcf format, you can import thousands of records instantly and effectively. *Prism SalesPRO CRM* supports importing data into different modules including Leads, Contacts, Organizations, Opportunities, etc.

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Check List

1. Mandatory Fields
Make sure your file addresses all mandatory fields. For instance, **Last Name** and **Company** fields are mandatory in Leads module. You cannot proceed with importing until or unless you have a value within these fields of your .csv file. If the value of mandatory fields is empty, they will be set to '????'.

2. File Size
Make sure the file to be imported do not exceed 5 MB size

3. Permissions
Admin users can disable import access to non-admin users from Profile level. If you can't find the Import option, you should contact your Administrator to enable import permission for your profile

Getting Started

This tutorial will walk you through different steps involved in importing records into your *Prism SalesPRO CRM* account. The entire process is simple and straightforward.

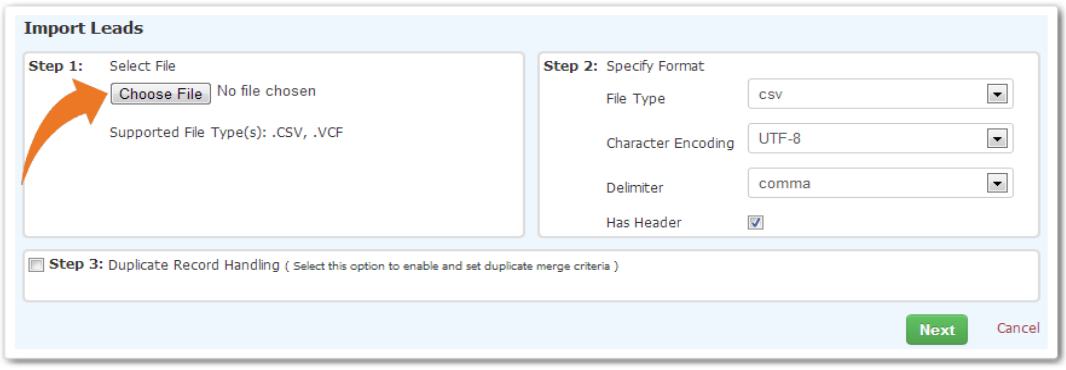
Follow few simple steps to import data into *Prism SalesPRO CRM*

1. Click [Module] tab. Eg: Leads, Contacts, etc
2. Click **Actions** > **Import**

Step 1: Select File

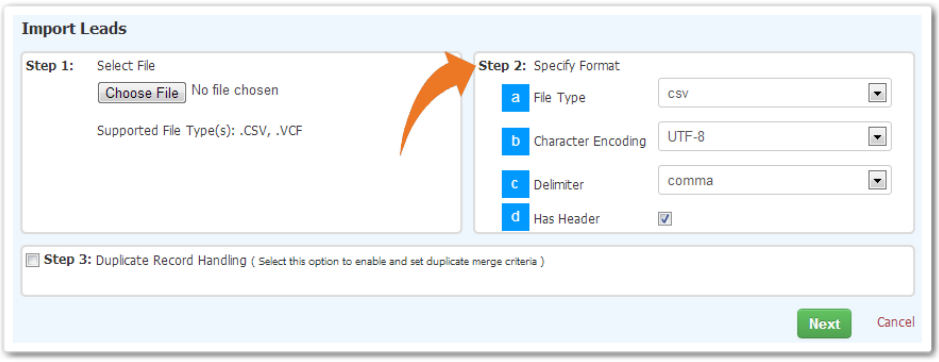
In the first step of importing process, you'll need to browse and upload your import file from your machine.

Here's how to select your.csv file
Click on the **Choose File** button, browse for desired file that is to be imported. Csv and vcf are the two file formats currently supported.



Step 2: Specify Format

In the second step of importing process, you'll need to specify import file properties. The details of each property are explained below.



a. File Type: *Prism SalesPRO*supports two different file types namely: .csv and .vcf. Select the appropriate value from the **File Type** dropdown that describes the format of the file you've selected in Step:1. For instance, if you've uploaded .csv file, select .csv from **File Type** field.

b. Character Encoding: Make sure you select the right character set in which your import file has been encoded. You'll need to select right encoding of the file irrespective of the file contents.

c. Delimiter: *Prism SalesPRO CRM* supports comma (,) and semicolon(;) as field delimiters. The fields in your .csv file are recognized only if they are separated with delimiters. More often, in a csv file, fields are separated with commas(,). To know more about delimiters, click here

d. Header: While importing, the header of your .csv file is compared with fields in *Prism SalesPRO CRM*. Having a header makes it easy for you to map fields. Click on **Has Header**checkbox if your file has a header. First row of your csv file is considered as a header. Please make sure that you uncheck the **Has Header** field if your file doesn't have a header. To know more about headers, click here

File with header

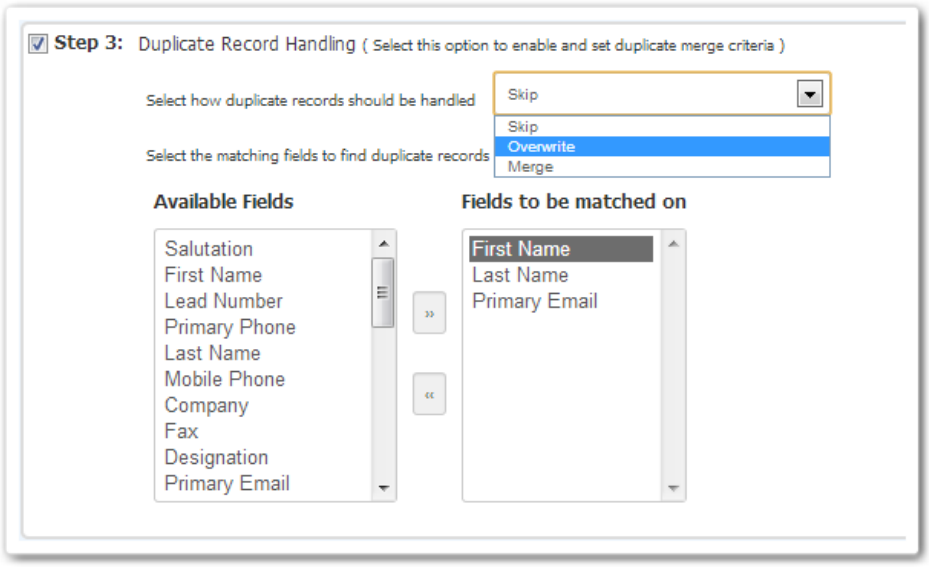
B	C	D
First Name	Last Name	Organization Name
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

File with no header

B	C	D
David	Hocking	Google
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

Step 3: Duplicate Record Handling

This is an optional step and comes into play if you would enable the checkbox in Step-3 of the import process. This option will help you in tracing out duplicate records. You can also configure the actions to be performed on duplicate records: skip, overwrite and merge. And finally, select desired fields for duplicate lookup by moving fields from the list of **Available Fields** to **Fields to be matched on** by using the right and left arrows.



Following actions can be performed on duplicate records

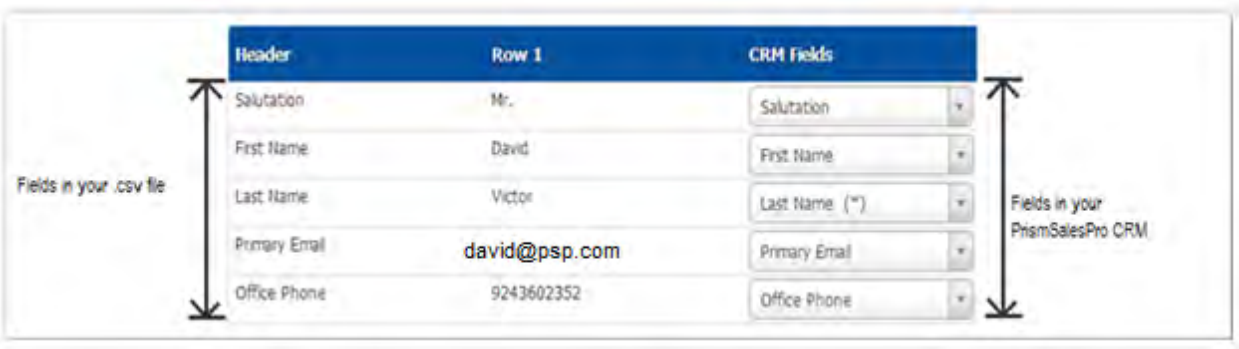
Skip: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, duplicate records in .csv file are not imported into *Prism SalesPRO CRM*.

Overwrite: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, the records in .csv file are imported and replaced with records in *Prism SalesPRO CRM*.

Merge: After import, duplicate records are identified based on fields criteria. Merge, unlike overwrite and skip, checks for duplicate records first and then captures only useful information from your .csv file and updates it in your *Prism SalesPRO CRM*.

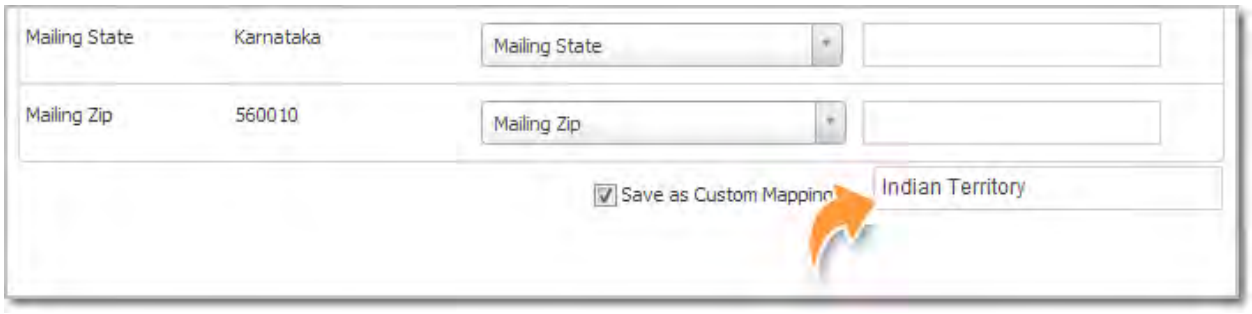
Step 4: Map CRM Fields

In the final step of import process, you will need to map import file Header/Column to fields in *Prism SalesPRO CRM*. Fields will be automatically mapped if your csv file's header matches with *Prism SalesPRO CRM* field label.



You can provide default values for mapping fields which will be picked up in case if the value for any field in file will be empty.

Also, frequently used mappings can be saved and reused.



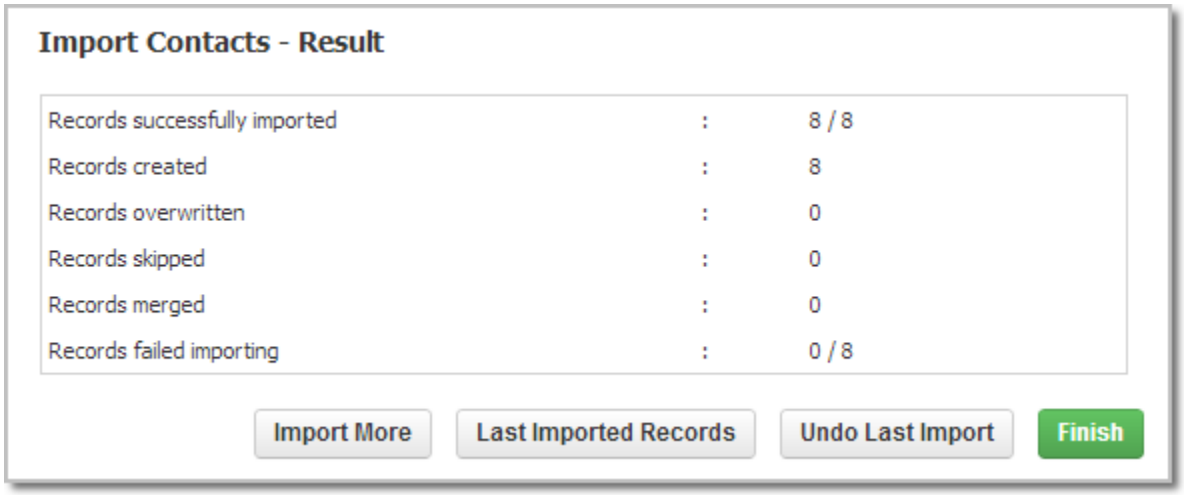
Saved mappings will be accessible across all users. You can delete the saved mappings by clicking on Trash icon.

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

After successfully mapping fields, click **Import** button.

Import Results

After successfully importing records into *Prism SalesPRO CRM*, the import results are displayed in tabular format



- **Import More**

  Lets you start all new import again

- **Last Imported Records**

  Displays records imported lately with the help of paging support.

- **Undo Last Import**

  Deletes all records that are created during the last import session. Reference records related to other modules will not be deleted.

Notifications

Import Scheduled!
If you have more than 1000 records in your file, your import will be scheduled on cron which is configured to run once in every 15 minutes. If you have configured your Outgoing Server and Email id properly, an email notification will be sent to you after successful import

Data Corruption Error

This error shows up when the import is interrupted for various reasons like crashing in between, or canceled by a user etc. This error indicates that the import table still has records to be imported into the system, but all the information related to the import (like mapping, default values, merge criteria) are all lost. So these records can no more be imported and the user needs to clear this data before starting any other import.

Import Locked Error

This error will be displayed if the import has been already been started on the same module by any other user in *Prism SalesPRO CRM*. The details of the module, the user, and the time at which the Import has been locked is detailed within the error message itself.
Import Interrupted Error

If an Admin user is performing import and if a non-admin user tries to start an import on the same module, he will get to see the Import Locked error. If non-admin user is doing import, and Admin user attempts to import on the same module, same time, he can be able to see the status of the current import and he will even have powers to cancel the current import; Consequently, the Import Interrupted Error will be displayed to non-admin user.

Attention!
1.If you would start importing in one particular module, you cannot import records into the same or any other module in *Prism SalesPRO CRM*.
2.If you would trigger import on a particular module, neither you nor any other user in *Prism SalesPRO CRM* can import records into the same module. However, other users can import records into other modules in *Prism SalesPRO CRM*

Converting Leads

Once a Lead is qualified and determined to be a potential sale, the Lead can be converted to an Opportunity. A Contact record and Organization record will be created simultaneously to store the personal information and company information.
Steps to convert a Lead

1. Click on the Lead record you intend to convert
2. In the detail view, Click **Convert Lead** Button
3. In the convert Lead pop-up, you can modify the existing values and transfer related records.
4. If there is a chance of immediate sale, un-check Opportunity check-box.
5. Click Save

Notes

1.You can transfer related records (Documents, Emails etc) to either Organization or Contacts by selecting the radio button during the Lead Conversion.
2.Lead record will no more be available after Lead Conversion.
3.After conversion, Contact, Organization or Opportunity records cannot be reverted to the previous state.

B2C Model

If you are dealing business only with a Contact, you can remove the mandatory status of Company field in Leads Module and un-check Organization check-box in Lead Conversion pop-up; As a result, only a contact record will be created upon Lead conversion.

Mapping Fields

Prism SalesPRO CRM allows you to map Standard fields and Custom fields before converting a lead to Contact and Organization, or an Opportunity. The field values will be transmitted to the selected target fields. This will ensure that the data will not be lost upon Lead conversion. Standard fields will be automatically mapped but the custom fields should be mapped manually.
Steps to modify the existing fields or map custom fields

1. Click Settings Icon > CRM Settings
2. Click Module Manager
3. Locate Leads and Click Leads Settings Icon (Hammer icon)
4. Click Leads Field Mapping
5. Click Edit button modify existing field settings
6. Click Add Mapping button; Consequently, new set of fields will be added to map custom fields.
7. Select the source field and map it to the target field accordingly.
8. Click Save

Notes

1. Target Field type should be identical to the Source Field type. For instance, If Source Field is a Picklist, the Target Field should also be a Picklist Field.
2. The Target Field size should be greater than or equal to the Source Field.
3. Target Field values should only be mapped once.

Exporting Organizations to External Source

If you ever want your data in the form of a spreadsheet, you can export your Organizations records right away.

Steps to export your data

1. Click **Organizations** tab

2. Click **Actions** button > **Export**

3. In the Export Records page, you will find the following options

Export selected records	Click on the radio button to export the records selected in List view
Export data in current page	Click on the radio button to export all the records that are on the current list view page
Export all data	Click on the radio button to export all records in Organizations module

4. Click **Export Organizations** button.

Managing Organizations

List of operations you can perform on records in Organizations Home page

1. Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria

2. Search desired records

3. Click on **Actions** drop-down to perform following operations

    Select **Edit** to modify selected record(s)

    Select **Delete** to delete selected record(s)

    Select **Add Comment** to add a comment on selected record(s)

    Select **Send email** to send out emails to selected record(s)

    Select **Send SMS** to send out SMS to selected record(s)

4. Click Settings button to perform following operations

    Select **Edit Fields** to configure fields and customize the layout of fields through Layout Editor

Select **Edit Workflows** to view / create new Workflows on Organizations module

Select **Edit Picklist values** to modify picklist values through Picklist Editor

List of operations you can perform on detail view of Organization record

1. Click **Edit** to modify existing content
2. Click **Send Email** to send email to existing Organization record
3. Click on **More** drop-down to perform following operations on Organization record

1. Select **Delete** to delete the existing Organization record
2. Select **Duplicate** to clone existing Organization record
3. Select **Add Document** to attach a document to existing Organization record
4. Select **Organization Hierarchy** to view administrative body with each Organization subordinate to the one above
5. Select **Send SMS** to send out sms to existing Organization record
6. Select **Add Event** to schedule a Call or Meeting and Select **Add Task** to schedule a Todo

Fields Information

Information of fields in the Organizations module.

Organization Name	Specify the name of the Organization
Website	Specify company's website URL
Member Of	Select or create parent company for existing Organization record
Ticker Symbol	Specify company's ticker symbol
Primary Email	Specify email address of the Organization
Ownership	Specify the ownership type of the company
Employees	Specify the number of employees working in the company
Industry	Specify the type of industry from the pick-list
Assigned to	Select any user(s) to make him/her the owner of Organization record
Description Details	Specify additional details about the Organization

Associating Organizations with Other Records

This will display all-round view of relations of Organizations module with other modules and maintains log of complete history.You can keep track of following details in Organizations module

Comments	To view the Comments related to the Organization record
Updates	To view the modifications done on Organization record
Contacts	To view the contacts that are related to the Organization record
Opportunities	To view the opportunities that are related to the Organization record
Quotes	To view the Quotes related to the Organization record
Sales Order	To view the Purchase Orders related to the Organization record
Invoice	To view the Invoices related to the Organization record
Activities	To view or create Events and To-dos on a Organization record
Emails	To view the emails sent to Organization record
Activity History	To view all Events and To-dos that are completed or status changed as **Held**
Documents	To view the documents related to the Organization record
Tickets	To view the Trouble Ticket records related to the Organization record
Products	To view the Products related to Organization record. You can have here the products that might interest your customer
Service Contracts	To view the Service Contracts related to the Organization record
Services	To view the Services related to Organization record. You can have here the Services that might interest your customer
Campaigns	To view the Campaigns related to the Organization record
Assets	To view the Assets related to the Organization record
Projects	To view the Projects that are related to the Organization record

3. Opportunities

What is an Opportunity?

Opportunity represents prospect with plentiful chances of generating revenues. Opportunities provide strategy to follow up prospective customers who are likely to successfully finish the sale. It helps you track the potential of prospects through the sales cycle.

An opportunity represents a potential sale. Customers who are very likely to purchase your product can be termed as Opportunities. They hold a lots of importance as they present complete information of sales process from beginning to the end.
The journey of sales process may begin at different stages

1. Creating an Opportunity for a Lead
2. Creating an Opportunity for an Existing Contact/Organization
3. Creating an Opportunity for a New Customer

Converting an Opportunity from a Lead

A Lead can also be converted to an Opportunity to track the Sales process from **Lead Qualification to End of sale** (Deal won or Deal Lost)
The things you can exclusively do only with Opportunities

1. Track Sales Stages, Forecast Amount etc
2. Schedule Product presentations, Calls, Meetings etc
3. Sending Quote
4. Price negotiations

Creating an Opportunity for an Existing Customer

Existing customer is the one that is already dealing business with you. Details of customer are stored in your *Prism SalesPRO CRM* as Contact or an Organization record. If you have gotten the same customer as a new lead to deal a new business, you can create an Opportunity record and associate with existing Contact/Organization.

Creating an Opportunity for a New Customer

New customer is the one that doesn't have any records history in your *Prism SalesPRO CRM*. If you will have to deal business with new person or a company, you can create related Contact/Organization record in *Prism SalesPRO CRM* and associate it with new opportunity record.

Creating Opportunities Manually

You can enter Opportunity details manually from Opportunities Module. This might come handy if you will have to enter Opportunity details individually.
Steps to create Opportunity records manually

1. In Opportunities tab, click on Add Opportunity button
2. In the Create Opportunity view, fill in the Opportunity details
3. Click Save

Quick Create

You can enter basic details of Opportunity record through Quick create. This might be helpful if you are running out of time.
Steps to create Opportunity records through Quick create

1. Click (+) Icon on top right corner
2. Click Opportunity
3. In the Create Opportunity view, fill in the Opportunity details
4. Click Save

Import existing data

If you have your data in .csv or .vcf format, you can import thousands of records instantly and effectively. *Prism SalesPRO CRM* supports importing data into different modules including Leads, Contacts, Organizations, Opportunities, etc.

Check List

1. **Mandatory Fields**
   Make sure your file addresses all mandatory fields. For instance, **Last Name** and **Company** fields are mandatory in Leads module. You cannot proceed with importing until or unless you have a value within these fields of your .csv file. If the value of mandatory fields is empty, they will be set to '????'.

2. File Size
Make sure the file to be imported do not exceed 5 MB size

3. Permissions
Admin users can disable import access to non-admin users from Profile level. If you can't find the Import option, you should contact your Administrator to enable import permission for your profile

Getting Started

This tutorial will walk you through different steps involved in importing records into your *Prism SalesPRO CRM* account. The entire process is simple and straightforward.

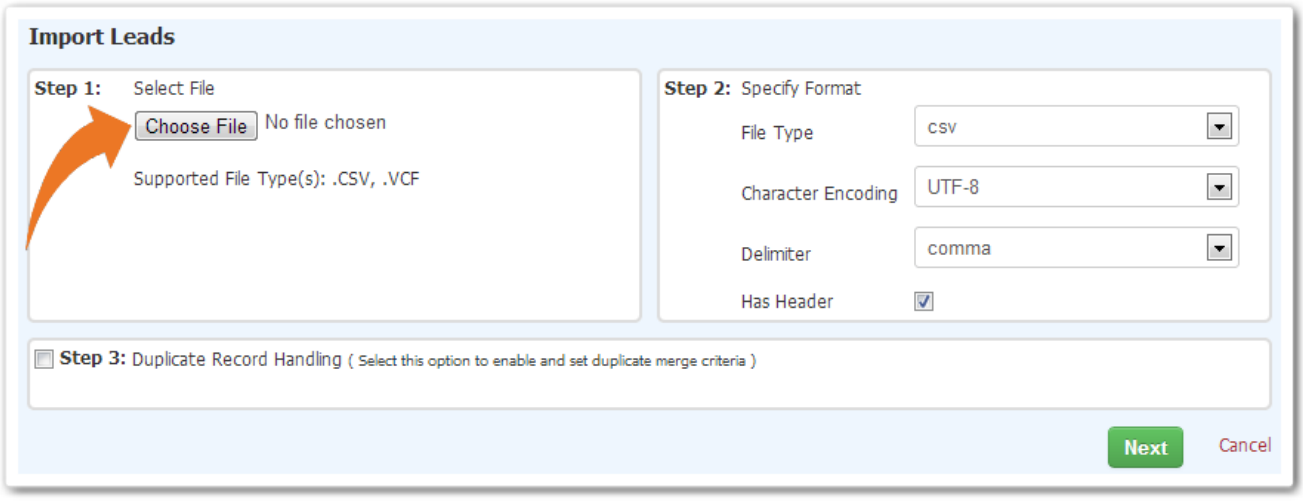
Follow few simple steps to import data into *Prism SalesPRO CRM*

1. Click [Module] tab. Eg: Leads, Contacts, etc
2. Click **Actions** > **Import**

Step 1: Select File

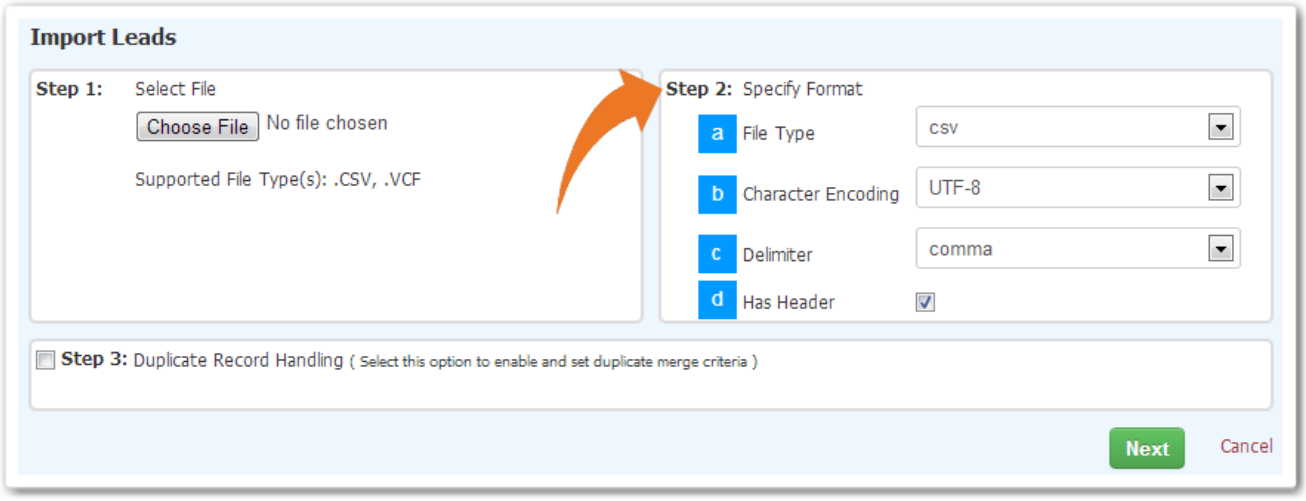
In the first step of importing process, you'll need to browse and upload your import file from your machine.

Here's how to select your.csv file
Click on the **Choose File** button, browse for desired file that is to be imported. Csv and vcf are the two file formats currently supported.



Step 2: Specify Format

In the second step of importing process, you'll need to specify import file properties. The details of each property are explained below.



a. File Type : *Prism SalesPRO*supports two different file types namely: .csv and .vcf. Select the appropriate value from the **File Type** dropdown that describes the format of the file you've selected in Step:1. For instance, if you've uploaded .csv file, select .csv from **File Type** field.

b. Character Encoding : Make sure you select the right character set in which your import file has been encoded. You'll need to select right encoding of the file irrespective of the file contents.

c. Delimiter *Prism SalesPRO CRM* supports comma (,) and semicolon(;) as field delimiters. The fields in your .csv file are recognized only if they are separated with delimiters. More often, in a csv file, fields are separated with commas(,).

d. Header : While importing, the header of your .csv file is compared with fields in *Prism SalesPRO CRM*. Having a header makes it easy for you to map fields. Click on **Has Header**checkbox if your file has a header. First row of your csv file is considered as a header. Please make sure that you uncheck the **Has Header** field if your file doesn't have a header.

File with header

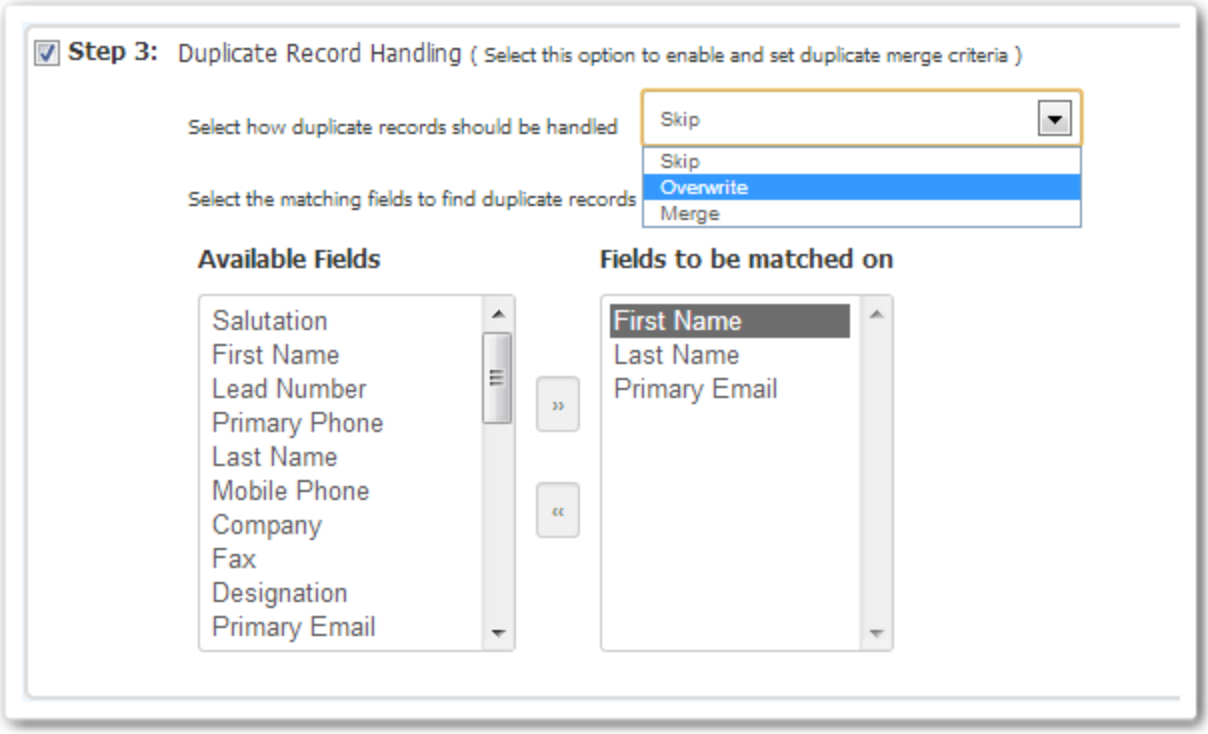
B	C	D
First Name	Last Name	Organization Name
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

File with no header

B	C	D
David	Hocking	Google
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

Step 3: Duplicate Record Handling

This is an optional step and comes into play if you would enable the checkbox in Step-3 of the import process. This option will help you in tracing out duplicate records. You can also configure the actions to be performed on duplicate records: skip, overwrite and merge. And finally, select desired fields for duplicate lookup by moving fields from the list of **Available Fields** to **Fields to be matched on** by using the right and left arrows.



Following actions can be performed on duplicate records

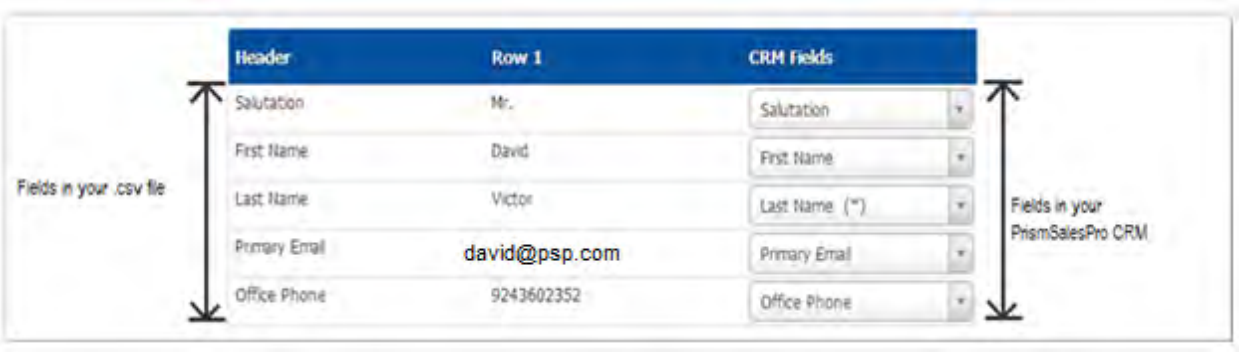
Skip : After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, duplicate records in .csv file are not imported into *Prism SalesPRO CRM*.

Overwrite : After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, the records in .csv file are imported and replaced with records in *Prism SalesPRO CRM*.

Merge : After import, duplicate records are identified based on fields criteria. Merge, unlike overwrite and skip, checks for duplicate records first and then captures only useful information from your .csv file and updates it in your *Prism SalesPRO CRM*.

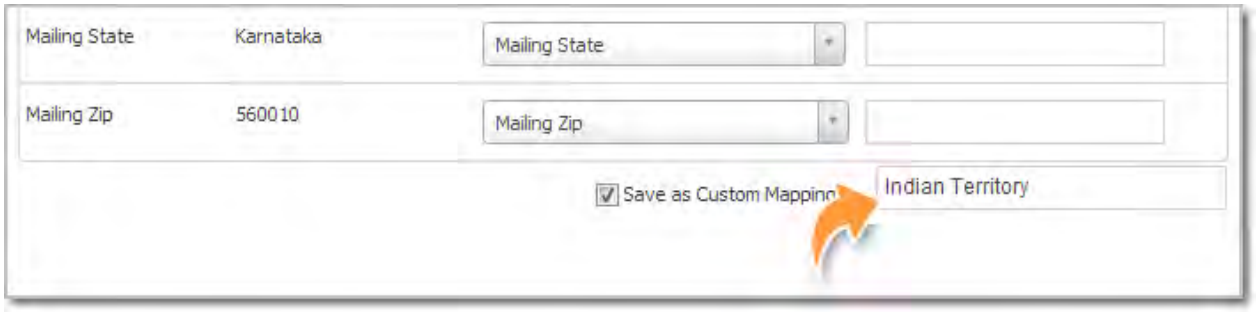
Step 4: Map CRM Fields

In the final step of import process, you will need to map import file Header/Column to fields in *Prism SalesPRO CRM*. Fields will be automatically mapped if your csv file's header matches with *Prism SalesPRO CRM* field label.



You can provide default values for mapping fields which will be picked up in case if the value for any field in file will be empty.

Also, frequently used mappings can be saved and reused.

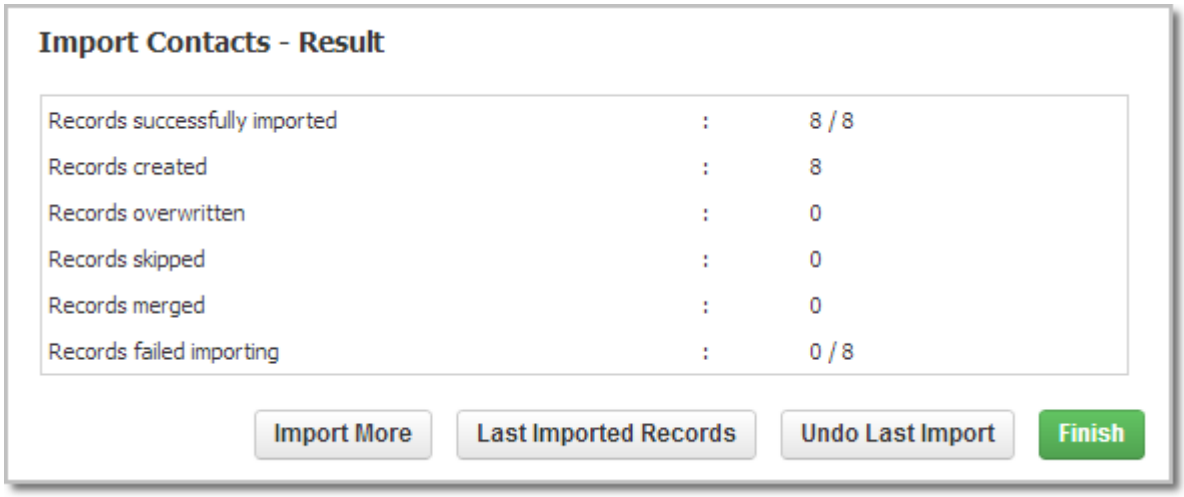


Saved mappings will be accessible across all users. You can delete the saved mappings by clicking on Trash icon.

After successfully mapping fields, click **Import** button.

Import Results

After successfully importing records into *Prism SalesPRO CRM*, the import results are displayed in tabular format



- **Import More**

  Lets you start all new import again

  - **Last Imported Records**

    Displays records imported lately with the help of paging support.

    - **Undo Last Import**

    Deletes all records that are created during the last import session. Reference records related to other modules will not be deleted.

Notifications

Import Scheduled!
If you have more than 1000 records in your file, your import will be scheduled on cron which is configured to run once in every 15 minutes. If you have configured your Outgoing Server and Email id properly, an email notification will be sent to you after successful import

Data Corruption Error

This error shows up when the import is interrupted for various reasons like crashing in between, or canceled by a user etc. This error indicates that the import table still has records to be imported into the system, but all the information related to the import (like mapping, default values, merge criteria) are all lost. So these records can no more be imported and the user needs to clear this data before starting any other import.

Import Locked Error

This error will be displayed if the import has been already been started on the same module by any other user in *Prism SalesPRO CRM*. The details of the module, the user, and the time at which the Import has been locked is detailed within the error message itself.
Import Interrupted Error

If an Admin user is performing import and if a non-admin user tries to start an import on the same module, he will get to see the Import Locked error. If non-admin user is doing import, and Admin user attempts to import on the same module, same time, he can be able to see the status of the current import and he will even have powers to cancel the current import; Consequently, the Import Interrupted Error will be displayed to non-admin user.

Attention!
1. If you would start importing in one particular module, you cannot import records into the same or any other module in *Prism SalesPRO CRM*.
2. If you would trigger import on a particular module, neither you nor any other user in *Prism SalesPRO CRM* can import records into the same module. However, other users can import records into other modules in *Prism SalesPRO CRM*.

Exporting Opportunities to External Source

If you ever want your data in the form of a spreadsheet, you can export your Opportunities records right away.
Steps to export your data

1. Click Opportunities tab

2. Click More button > Export

3. In the Export Records page, you will find the following options

Export selected records	Click on the radio button to export the records selected in List view
Export data in current page	Click on the radio button to export all the records that are on the current list view page
Export all data	Click on the radio button to export all records in Opportunities Module

3. Click Export Opportunities button.

Forecast Amount

The Forecast field in Opportunities module helps you in anticipating the scope of business that can be done with the Opportunity record. The values will be populated automatically depending upon Amount and Probability fields.
The following calculation is done in Workflows
Forecast Amount = Amount * Probability.
For instance, if Amount = 1000 and Probability = 20% then the Forecast Amount= 200
The formula has been configured under the workflow **Opportunities : Calculate or Update forecast amount.** Click on edit icon and modify or disable the workflow according to your requirements

Workflows

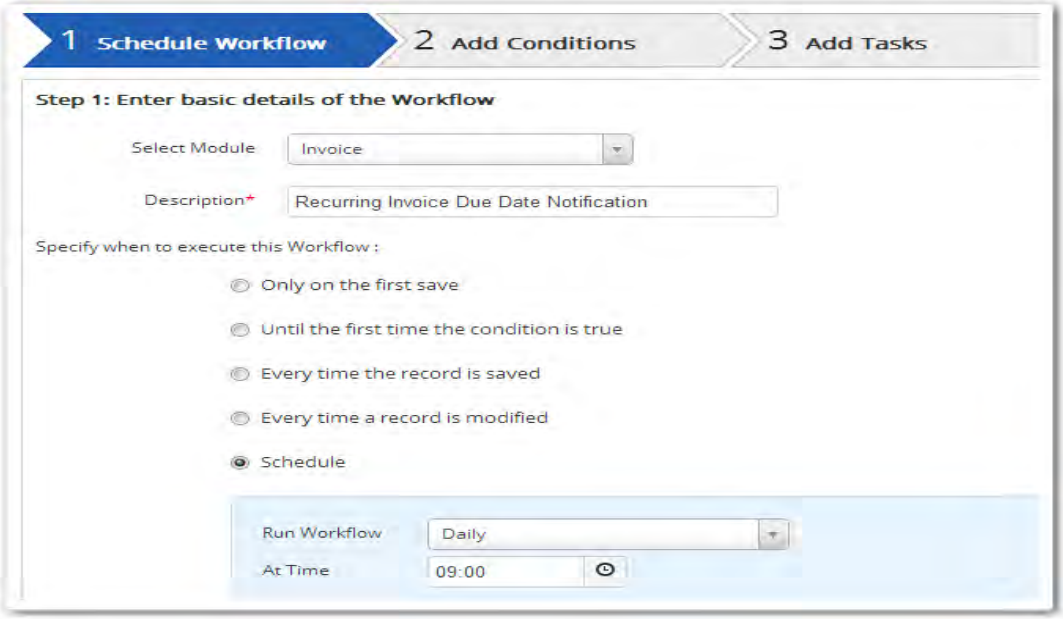
Workflows will streamline your business by automating operations like sending emails, creating activities, updating fields, etc. As tasks are performed automatically, you need not have to execute them manually.

Follow few simple steps to setup a workflow

1. Click gear icon icon in the top right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Workflows**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click **New Workflow**

Step 1: Scheduling workflow

You'll need to provide basic details that include selecting a module and scheduling workflow. **Workflows** gives you the ability to perform different operations on the selected module such as: sending an email, updating fields, creating a whole new record in another module, creating an event or todo, etc. This answers the question *why should we select a module here?*. We will discuss the actions that are triggered by the workflows in detail in Step-3.



You'll need to specify when would you like to run the workflow. Workflow running conditions are all predefined and you only have to choose the condition that suite your requirements.

1. **Only on the first save**- Triggers workflow on your first save ie., when you create a new record.
2. **Until the first time the condition is true**- Triggers workflow if your condition(Step-2) will be true. Once executed, your workflow will not trigger on the same record again. However, it will trigger actions on other records in the selected module.
3. **Every time the record is saved**- Triggers workflow every time you will save your record—including first save.
4. **Every time the record is modified**- Triggers workflow every time you edit and save your record—excluding first save.
5. **Schedule** -Triggers workflow on a certain date

Complicated? Umm, let me give you a few examples for a better understanding

Only on first save

For instance, I am Rahul, sales agent in ABC company. I manage to send a warm welcome note to new customers through email. I will create a workflow for this purpose and my workflow running condition will be **Only on the first save**. This will trigger workflow only when new record is created.

Until the first time the condition is true

Records with 'Sales Stage' equals to 'Closed Won' should be automatically assigned to me. This happens only once in the sales cycle of a record. For that reason, I will create a workflow and have the condition **Until the first time the condition is true**. Once the workflow is executed, it's not going to perform the same operation on that record again.

Every time the record is saved

When a deal is won, 5 % share of the total amount goes to the sales agent. I do not waste my time in calculations. I would rather create a workflow. This should execute every time record is saved; as a result, values will be automatically updated.

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

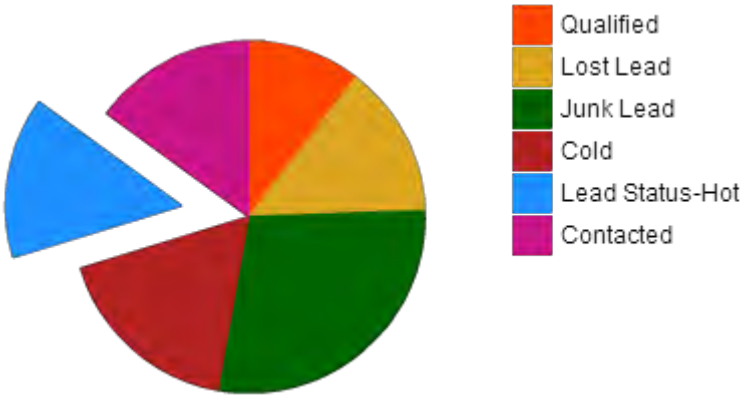
Every time the record is modified

I want *Prism SalesPRO CRM* to trigger me an email if someone modifies information in 'Amount' field in Opportunities module. I will create a workflow and have the condition **Every time the record is modified**. This workflow will execute every time edit+save operation will be performed on a record.

Adding Condition(s)

Workflows will be executed on the records in the selected module. More often, you might only need to perform operations on selected records in that module. This is where conditions will come into play. Workflow will only be executed on the records that satisfy the condition specified by you.

For instance, I would like to create a workflow on Leads module. I want the workflow to execute operations on records with 'Lead Status' equals 'Hot'. So, my condition will be Lead Status is Hot



You'll find two different options while defining conditions. The functionality of the conditions is described below with an example

1. **All Conditions :** Filters records based on AND condition.

For instance,

Condition 1

AND

Condition 2

AND

Condition 3

Displays the results if and only if ALL conditions are matched. If one condition is failed, other queries will not be executed.

2. **Any Conditions :** Filters records based on OR condition.For instance,

Condition 1

OR

Condition 2

OR

Condition 3

Displays the results if at-least ONE condition is matched. If one query is failed, other queries will be executed.

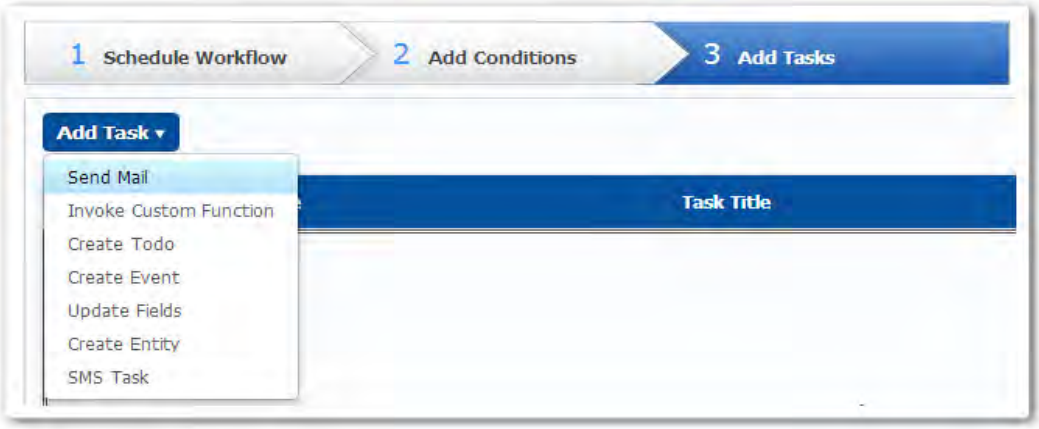
Notes!
1. By default, AND condition is enabled between **ALL conditions** and **ANY conditions**. This will help you in grouping the two conditions, altogether.
2. You can provide existing or custom criteria while defining conditions.
3. You can define multiple conditions for a workflow by clicking on **Add Condition** button.

After defining conditions, click **Next**

Adding Task(s)

The actions that should be executed with the help of workflows can be configured through tasks, while previously defined steps are just to provide directions and inputs.

Click Add Task button and select desired task



1. **Send Mail** - To send an email notification
2. **Invoke Custom Function**- To update target fields of records in a module when actions are performed on source field in a different module
3. **Create Event** - To create a new calendar event
4. **Create To do** - To create a new calendar task
5. **Update fields** - To updates field(s) of selected module
6. **Create Entity** - To create or update records when conditions are satisfied on parent record
7. **SMS Task** - To send SMS notification

Managing Opportunities

Following is the list of Operations you can perform on records in Opportunities Home page.

1. Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria.
2. Click on Mass Actions button and perform actions on desired records like: Edit, Delete and Add comments.
3. Click Settings button > **Edit Fields** to configure fields and customize the layout of fields through LayoutEditor.
4. Click Settings button > **Edit Worlflows** to view / create new Workflows on Opportunities.
5. Click Settings button > **Edit Picklist values** to modify picklist values through Picklist Editor.
6. Search desired records.

Set up Top Deal Notifications

Be vigilant! Get notified every time you have a big deal. Automate Email alerts for sharing the top deal details with your team members, colleagues or other office staff.
Steps to set up email alerts

1. Click Opportunities tab

2. Click Settings button > Edit Workflows
3. Click **New Workflow** button
4. Select Opportunities from drop down and click Create button
5. Provide a Description (This is only for future reference)
6. Select a condition to run the workflow. For instance, I will select ***Only on the first save*** for my workflow
7. Click **New Condition Group** button and provide desired condition. For instance, Amount Greater than 10000 is my condition
8. Click Save
9. After Save, click New Task button and select **Send Mail** as task type and click Create button
10. Provide Task Title (This is only for your reference)
11. Select the Recipients from drop-down or enter manually.
12. Provide the Subject, Email body and click Save.

Associate Opportunities with Other Records

This will display all-round view of relations of Opportunities module with other modules and maintains log of complete history.

You can keep track of following details in Opportunities Module

Comments	To view the comments exchanged between different users
Activities	To Schedule an Activity
Contacts	To associate existing Contact records
Products	To associate existing products. Basically the products the opportunity record might be interested in.
Documents	To associate existing documents the opportunity might be interested in.
Quotes	To view already created quotes or create new quote.
Sales Order	To view already created Sales Order or to create a new Sales Order.
Activity History	Displays all the Events and To dos that are completed or status changed as **Held**
Services	To associate existing services

5. Invoices

What is an Invoice?

An invoice, or a bill, is a non negotiable itemized statement issued for the Products and Services rendered to the customer. It usually contains the Products or Services details, Prices and Taxes, Dates, Parties involved, Address information, Terms and Discounts, and payment methods.

Creating an Invoice individually
You can easily create an Invoice by entering information in the fields provided.

Follow few simple steps to create an Invoice

1. Click **All** drop-down
2. Click **Invoice**
3. In the list view of Invoices module, click **Add Invoice**
4. Provide necessary information the fields, and click **Save**

Creating Invoice from a Quote
After the Quote is approved, you can create an Invoice record out of it. Automatically, the information in Quote record is transferred to Invoice record.

Follow few simple steps to create an Invoice from Quote record

1. Click **All** drop-down
2. Click **Quotes**
3. In the list view of Quotes module, click on desired quote record
4. In the detail view of that quote record, click **More** drop-down and click **Generate Invoice**
5. Modify details, if necessary, and click **Save**

Creating Invoice from a Sales Order
After the Sales Order is successfully created, you can create an Invoice record out of it. Automatically, the information in Sales Order record is transferred to Invoice record.

Follow few simple steps to create an Invoice from Sales Order record

1. Click **All** drop-down
2. Click **Sales Order**
3. In the list view of Sales Orders module, click on desired sales order record
4. In the detail view of that sales order record, click **More** drop-down and click **Create Invoice**
5. Modify details, if necessary, and click **Save**.

Creating Invoice from an Opportunity

After winning a deal, you can create an Invoice record out of an opportunity record. Automatically, the information in Opportunity record is transferred to Invoice record.

Follow few simple steps to create an Invoice from Sales Order record

1. Click **All** drop-down
2. Click **Opportunities**
3. In the list view of Opportunities module, click on desired opportunity record
4. In the detail view of that opportunity record, click **More** drop-down and click **Create Invoice**
5. Modify details, if necessary, and click **Save**

Operations you can perform in list view of Invoices module
List view of the Invoices module enables you to perform mass actions like editing, deleting and filtering records in bulk. In addition, you can also edit fields, workflows and picklist values.

Follow few simple steps to manage operations in the list view of Invoices module

1. Click **All** drop-down
2. Click **Invoices**
3. Click on checkboxes of desired Invoice records beforehand performing edit and delete operations
4. Click **Actions** > **Edit** to modify invoice record(s) in bulk
5. Click **Actions** > **Delete** to delete invoice record(s) in bulk
6. Click **All Invoices** dropdown > **Create New Filter** to create a new view and sort desired records in one bucket
7. Click wrench icon > **Edit Fields** to configure fields through Layout Editor
8. Click wrench icon > **Edit Workflows** to set up workflows through Workflows
9. Click wrench icon > **Edit Picklist Fields** to configure picklist fields through Picklist Editor.

of Invoice record enables you to perform actions like editing, deleting, cloning, exporting the existing record in PDF format, etc

Operations you can perform in detail view of Invoice record

Detail view of Invoice record enables you to perform actions like editing, deleting, cloning, exporting the existing record in PDF format, etc

Follow few simple steps to manage operations in detail view of Invoices module

1. Click **All** drop-down
2. Click **Invoices**
3. Click on desired invoice record
4. Click **Edit** to modify field information
5. Click **More** > **Delete** to delete the invoice record
6. Click **More** > **Duplicate** to clone an invoice record
7. Click **More** > **Export to PDF** to export the invoice record in the default PDF format offered by *Prism SalesPRO CRM*
8. Click **More** > **Export to PDF** to export the invoice record in the default PDF format and export to selected recipients

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9. Click on **Export** button below PDF Maker drop-down on the left to export customized invoice records
10. Click **Tag Cloud** drop-down on the left to tag current invoice record.

Tagging Records

If a particular record holds a lot of importance, you can make it stand out from the list of other records. You can simply tag a record, and view it in **Tag Cloud** home page widget
Follow few simple steps to tag desired record

1. Click desired module(Eg: Leads, Contacts, etc)
2. Click on desired record
3. In the detail view of that record, click on **Tag Cloud** label in the left side
4. Provide unique name in the text space
5. Click **Tag this Record**

The list of all tagged records can be viewed in **Tag Cloud** widget in Home page.

Points to remember!

1. You can't provide same tag label to same record while different tag labels to same record are accepted

2. Interestingly, when multiple records are tagged with same label, the tag in **Tag Cloud** widget grows bigger

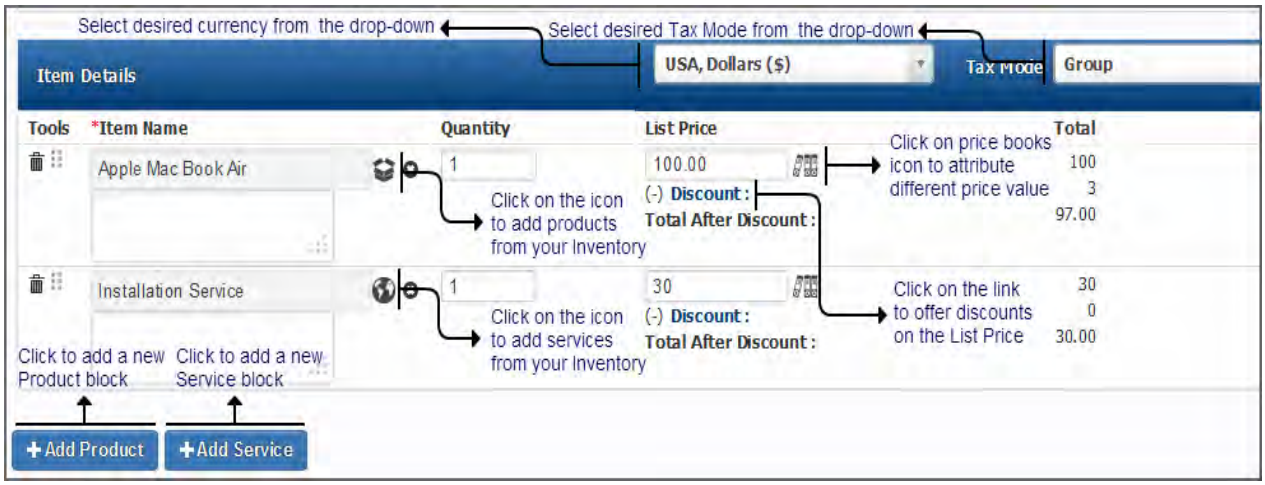
3. By clicking on a tag you can view all the records that were tagged under it

Item Details Block

Item Details block in the Invoices module gives you the flexibility to add Products/Services, manage different prices through Price Books, and offer discounts.

Follow few simple steps to manage operations in the Item Details block

1. Click **All** drop-down
2. Click **Invoices**
3. In the create view or edit view of the existing invoice record, you can locate the **Item Details** block
4. The operations you can manage in the Item Details block are depicted in the diagram below



Associating Invoice with other records

This will display all-round view of the relations of Invoice module with other modules and maintains a log of complete history.

Updates	To track all modifications done on Invoice record
Activities	To schedule a task
Documents	To associate documents with current invoice record
Assets	To associate assets with current invoice record
Payments	To accept incoming payments online. You can view all payments done on current invoice record

Note!
1.If you generate an Invoice on a product, the stock units will be reduced and values will be updated in the **Quantity in the Stock** field of that product record

6. Quotes

What is a quote?

A Quote is a formal statement issued by a seller to the prospective buyer; basically, upon inquiry or request for a quotation. It contains the detailed list of Products and Services, Prices and Taxes, Dates, Parties involved, Address information, Terms and Discounts etc.

Creating Quotes Individually

You can easily create Quotes by entering information in the fields provided.

Follow few simple steps to create a Quote

1. Click **All** drop-down
2. Click **Quotes**
3. In the list view of quotes module, click **Add Quote**
4. Provide necessary information in the fields, and click **Save**

Operations you can perform in list view of Quotes module

List view of Quotes module enables you to perform mass actions like editing, deleting and filtering records in bulk. In addition, you can also edit fields, workflows and picklist values.

Follow few simple steps to manage operations in list view of Quotes module

1. Click **All** drop-down
2. Click **Quotes**
3. Click on checkboxes of desired quote records beforehand performing edit and delete operations
4. Click **Actions** > **Edit** to modify quote record(s) in bulk
5. Click **Actions** > **Delete** to delete quote record(s) in bulk
6. Click **All Quotes** dropdown > **Create New Filter** to create a new view and sort desired records into one bucket
7. Click wrench icon > **Edit Fields** to configure fields through Layout Editor
8. Click wrench icon > **Edit Workflows** to set up workflows through Workflows
9. Click wrench icon > **Edit Picklist Fields** to configure picklist fields through Picklist Editor.

Operations you can perform in detail view of quote record

Detail view of quote record enables you to perform actions like editing, deleting, cloning, exporting the existing record in PDF format, etc

Follow few simple steps to manage operations in detail view of Quotes module

1. Click **All** drop-down
2. Click **Quotes**
3. Click on desired quote record
4. Click **Edit** to modify field information

5. Click **More** > **Delete** to delete quote record
6. Click **More** > **Duplicate** to clone present quote record
7. Click **More** > **Export to PDF** to export the quote record in default PDF format offered by *Prism SalesPRO CRM*
8. Click **More** > **Export to PDF** to export the quote record in default PDF format and export to selected recipients
9. Click on **Export** button under PDF Maker drop-down in the left to export customized quote records
10. Click **Tag Cloud** drop-down in the left to tag current quote record. More details

Item Details block

Item Details block in Quotes module gives you the flexibility to add Products/Services, manage different prices through Price Books, and offer discounts.

Follow few simple steps to manage operations in Item Details block

1. Click **All** drop-down
2. Click **Quotes**
3. In the create view or edit view of existing quote record, you can locate the **Item Details** block
4. The operations you can manage in Item Details block are depicted in diagram below

Associating Quotes with other records:

This will display all-round view of relations of Quotes module with other modules and maintains log of complete history.

Updates	To track all modifications done on quote record
Activities	To schedule a task
Documents	To associate documents with current quote record

7. Sales Orders

What is a sales order?

Sales Order is an Internal document generated within the company after the Purchase Order is received. It helps your sales team track all the Products or Services that should be manufactured, shipped etc according to the agreed prices and dates. Sales Order comprise Sales Order number, Purchase Order, Recurring Invoice, Billing and Shipping Address, Products or Services, Prices and Taxes etc.

Creating Sales Order individually
You can easily create a sales order by entering information in the fields provided.

Follow few simple steps to create an sales order

1. Click **All** drop-down
2. Click **Sales Orders**
3. In the list view of sales order module, click **Add Sales Order**
4. Provide necessary information the fields, and click **Save**

Creating Sales Order from a Quote
After the quote is approved, you can create sales order record out of it. Automatically, the information in quote record is transferred to sales order record.

Follow few simple steps to create sales order from quote record

1. Click **All** drop-down
2. Click **Quotes**
3. In the list view of Quotes module, click on desired quote record
4. In the detail view of that quote record, click **More** drop-down and click **Generate Sales Order**
5. Modify details, if necessary, and click **Save**

Operations you can perform in list view of Sales Orders module
List view of Sales Orders module enables you to perform mass actions like editing, deleting and filtering records in bulk. In addition, you can also edit fields, workflows and picklist values.

Follow few simple steps to manage operations in list view of Sales Orders module

1. Click **All** drop-down
2. Click **Sales Orders**
3. Click on checkboxes of desired sales order records beforehand performing edit and delete operations
4. Click **Actions** > **Edit** to modify sales order record(s) in bulk
5. Click **Actions** > **Delete** to delete sales order record(s) in bulk

6. Click **All Sales Orders** dropdown > **Create New Filter** to create a new view and sort desired records in one bucket
7. Click wrench icon > **Edit Fields** to configure fields through Layout Editor
8. Click wrench icon > **Edit Workflows** to set up workflows through Workflows
9. Click wrench icon > **Edit Picklist Fields** to configure picklist fields through Picklist Editor.

Operations you can perform in detail view of sales order record

Detail view of sales order record enables you to perform actions like editing, deleting, cloning, exporting the existing record in PDF format, etc

Follow few simple steps to manage operations in detail view of Sales Orders module

1. Click **All** drop-down
2. Click **Sales Orders**
3. Click on desired sales order record
4. Click **Edit** to modify field information
5. Click **More** > **Delete** to delete sales order record
6. Click **More** > **Duplicate** to clone current sales order record
7. Click **More** > **Export to PDF** to export the sales order record in default PDF format offered by *Prism SalesPRO CRM*
8. Click **More** > **Export to PDF** to export the sales order record in default PDF format and export to selected recipients
9. Click on **Export** button under PDF Maker drop-down in the left to export customized sales order records
10. Click **Tag Cloud** drop-down in the left to tag current sales order record. More details

Item Details block

Item Details block in Sales Orders module gives you the flexibility to add Products/Services, manage different prices through Price Books, and offer discounts.

Follow few simple steps to manage operations in Item Details block

1. Click **All** drop-down
2. Click **Sales Orders**
3. In the create view or edit view of existing sales order record, you can locate the **Item Details** block
4. The operations you can manage in Item Details block are depicted in diagram below

Recurring Invoice

Your organization might have to create invoices periodically depending upon the businesses you deal. *Prism SalesPRO CRM* gives you the flexibility to generate recurring invoices from sales order records. Follow few simple steps to create recurring invoices

1. Click **All** tab on menu bar
2. Click **Sales Orders**
3. Click on desired sales order record
4. In the detail view of a sales order record, you can find *Recurring Invoice Information'* block

1. **Enable Recurring** : Enable the check-box to initiate generating invoices periodically
2. **Start Period** : Specify or select a date on which your first invoice should be generated
3. **Payment Duration** : Select the number of days within which your customer is supposed to make payment. Also, in the invoice record, **Due Date** is calculated as**Invoice generated date** + **Payment Duration**
4. **Frequency** : Invoice generating cycle depends on frequency you set. For instance, if you select **Monthly**, invoice is generated once in every month after Start Date
5. **End Period** : Specify or select a date on which you want your invoice to stop generating
6. **Invoice Status** : The newly created invoice record picks up this status automatically.

Associating Sales Orders with other records

This will display all-round view of relations of Sales Orders module with other modules and maintains log of complete history.

Updates	To track all modifications done on sales order record
Activities	To schedule a task
Documents	To associate documents with current sales order record
Invoice	To view the invoice record created from current sales order record

8. Purchase Orders

What is a Purchase Order?

A purchase order is a legal document handled over to a vendor to purchase Products or Services. It offers you a channel to explain your requirements and intentions explicitly. Purchase Orders comprise the purchase order number, vendor details, product or service details, terms and conditions, prices, etc.

Creating Purchase Order individually

You can easily create a purchase order by entering information in the fields provided.

Follow few simple steps to create a purchase order

1. Click **All** drop-down
2. Click **Purchase Orders**
3. In the list view of the purchase order module, click **Add Purchase Order**
4. Provide necessary information the fields, and click **Save**

Operations you can perform in list view of Purchase Orders module

List view of the Purchase Orders module enables you to perform mass actions like editing, deleting and filtering records in bulk. In addition, you can also edit fields, workflows and picklist values.

Follow few simple steps to manage operations in the list view of the Purchase Orders module

1. Click **All** drop-down
2. Click **Purchase Orders**
3. Click on the checkboxes of desired purchase order records beforehand performing edit and delete operations
4. Click **Actions** > **Edit** to modify purchase order record(s) in bulk
5. Click **Actions** > **Delete** to delete purchase order record(s) in bulk
6. Click **All Purchase Orders** dropdown > **Create New Filter** to create a new view and sort desired records in one bucket
7. Click wrench icon > **Edit Fields** to configure fields through Layout Editor
8. Click wrench icon > **Edit Workflows** to set up workflows through Workflows
9. Click wrench icon > **Edit Picklist Fields** to configure picklist fields through Picklist Editor

Operations you can perform in detail view of purchase order record

Detail view of the purchase order record enables you to perform actions like editing, deleting, cloning, exporting the existing record in PDF format, etc

Follow few simple steps to manage operations in detail view of the Purchase Orders module

1. Click **All** drop-down
2. Click **Purchase Orders**
3. Click on desired purchase order record
4. Click **Edit** to modify field information
5. Click **More** > **Delete** to delete purchase order record
6. Click **More** > **Duplicate** to clone a current purchase order record

7. Click **More** > **Export to PDF** to export the purchase order record in the default PDF format offered by *Prism SalesPRO CRM*
8. Click **More** > **Export to PDF** to export the purchase order record in the default PDF format and export to selected recipients
9. Click on **Export** button below PDF Maker drop-down on the left to export customized purchase order records
10. Click **Tag Cloud** drop-down on the left to tag current purchase order record. More details

Item Details block

Item Details block in the Purchase Orders module gives you the flexibility to add Products/Services, manage different prices through Price Books, and offer discounts.

Follow few simple steps to manage operations in the Item Details block

1. Click **All** drop-down
2. Click **Purchase Orders**
3. In the create view or edit view of existing purchase order record, you can locate the **Item Details** block
4. The operations you can manage in the Item Details block are depicted in the diagram below

Associating Purchase Orders with other records

This will display all-round view of relations of Purchase Orders module with other modules and maintains a log of complete history.

Updates	To track all modifications done on purchase order record
Activities	To schedule a task
Payments	To view payments done on current purchase order record
Documents	To associate new or existing documents with the current purchase order record

9. Home

What is a Home?

Prism SalesPRO CRM offers different home page widgets that will provide graphical representation of current status and key performance indicators. As complete analysis of data is displayed on one single screen, decisions and conclusions can be monitored at a glance.
List of widgets displayed on Home page

Admin users can deny normal user's access to Home page through Profiles.

Widgets

History
It displays the operations performed on records in modules such as Create and Edit. It also displays the comments made on a record. As it displays complete history, it will help the administrators to track the changes made on records.

History is a default widget and cannot be deleted.

Upcoming Activities

It displays the list of Events and to dos that are scheduled to be done in future.
Upcoming Activities is a default widget and cannot be deleted.

Funnel

It displays the list of Opportunity records according to their Sales stages.

Opportunities by Stage
It displays the graphical representation of Opportunity records of different users according to Sales stages.

Total Revenue
Pie diagram of revenues brought by different Sales reps are displayed

Top Opportunities
Detailed list of Opportunity records and revenues are displayed.
Notes
Opportunities with sales stage "Closed Won" and "Closed Lost" are not displayed.

Leads by Status
Graphical representation of Leads are displayed according to the Lead Status.

Leads by Source
Graphical representation of Leads are displayed according to the Lead Source.

Leads by Industry
Graphical representation of Leads are displayed according to the Industry they belong to.

Overdue Activities
Displays the list of pending events and to dos.

Tickets by Status
Graphical representation of Trouble Tickets is displayed according to their Status.
Open Tickets
Pie diagram displays open tickets assigned to different users in your *Prism SalesPRO CRM* account.

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

10. Reports

What is a Report?

Reports provides your sales team the ability to extract only data relevant to them from thousands of records. You may use these report features to get an overview of customer related activities and to draw conclusions on how to improve your sales process. You can generate reports based on desired criteria by using filters.

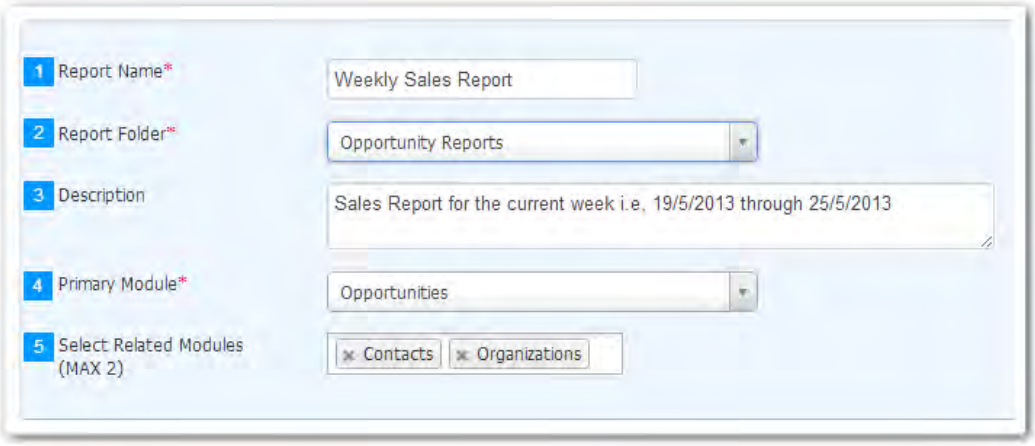
Creating a Report

You can group records of a kind in Folders. By default, all reports will be stored in **All Reports** folder. You can also create a custom folder to store your reports.
Follow few simple steps to create a new report

1. Click **All** dropdown
2. Click **Reports** tab
3. Click **Add Report** button

Step 1: Report Details

In Step 1 of creating reports, you'll need to provide a few basic details. The information of fields that are displayed in Step 1 are tabulated below



1. Report Name	Provide desired label for your report
2. Report Folder	Select from the existing folders to store your report
3. Description	Provide report description. This is just for future reference
4. Primary Module	Select a module to create report on records of that module

5. Select Related Modules	Select maximum two related modules to include fields of those modules while creating a report

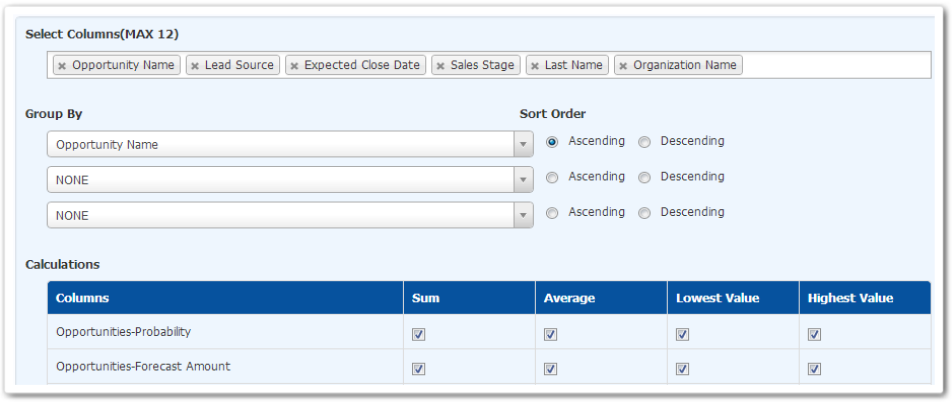
Notes! You can also proceed without selecting any related modules

4. Click **Next** button

Step 2: Select Columns

The second step in creating reports enables you to select columns to be displayed in your report, group by a particular field in ascending or descending order, and perform calculations on integer and currency fields.

5. Select desired columns to be displayed on your report



Selecting columns
You can select fields from selected module to be displayed in your report. You'll need to click on text space provided to select fields. Additionally, you can also select fields from related modules you've selected in Step 1.

Group By
While generating reports, more often, the information is not uniformly distributed. The information under same field is scattered and it makes the report cumbersome to handle. This feature enables you to group information basing on selected field. You can group them either in ascending or descending order of alphabets.
For instance, consider multiple contacts that are related to same organization. While creating a report on Contacts module, the results can be scattered.

We can group the report by Organization Name

Organization name is now grouped making the report look so clear and understandable

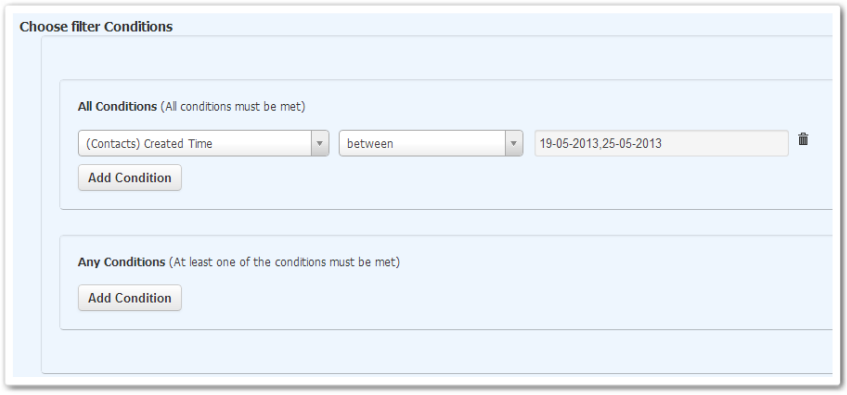
Calculations
Select check-boxes to perform calculations on Currency and Numeric fields.

5. Click **Next** button

Step 3: Filters

Records filtering conditions has been made very simple. Conditions are grouped into two blocks.

6. Provide condition to filter selected records. You can skip this step if you'd like to create report on all existing records in selected module.



1. All Conditions : Filters records based on AND condition.

For instance,

Condition 1

AND

Condition 2

AND

Condition 3

Displays the results if and only if ALL conditions will be matched. If one condition is failed, other queries will not be executed.

2.Any Conditions : Filters records based on OR condition.

For instance,

Condition 1

OR

Condition 2

OR

Condition 3

Displays the results if at-least ONE condition is matched. If one query is failed, other queries will be executed.

Notes!

1. By default, AND condition is enabled between ALL conditions and ANY conditions. This will help you in grouping the two conditions.

2. You can also filter the records on custom and existing date fields. You can provide existing or custom criteria to filter records.

3. The conditions are dynamic. For instance, **Today** as filter condition will display all the records on current day. It will not display the same records tomorrow. It will display the records of present day instead.

You can also proceed without creating any filter. That will display all the records of selected module.

7. Click **Generate Report** button

Customizing Report

If you want to modify the same report all over again, you can click on Customize Report button in the detail view of the report.

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Exporting Report

This feature gives you the flexibility to export your reports to .csv or .xlsx files. You'll need to click on corresponding icon in the detail view of the record to export it.

Additionally, you can also print your reports by clicking on print icon in the detail view of the report.

11. Campaigns

What is a campaign?

Campaigns offers your marketing team the ability to schedule and execute mass marketing campaigns. *Prism SalesPRO CRM* helps you create effective marketing campaigns with selected list of leads, contacts, opportunities and Organizations.

Creating Campaigns Manually

You can enter Campaign details manually from Campaigns Module. This might come handy if you will have to enter Campaign details individually.
Steps to create Campaign records manually

1. In Campaigns tab, click on Add Campaign button
2. In the Create Campaign view, fill in the Campaign details
3. Click Save

Quick Create

You can enter basic details of Campaign record through Quick create. This might be helpful if you are running out of time.
Steps to create Campaign records through Quick create

1. Click (+) Icon on top right corner
2. Click Campaign
3. In the Create Campaign view, fill in the Campaign details
4. Click Save

Create Emailing List

You can send emails to selected list of Leads, Contacts and Organization records. You can select records from existing list, filters, or you can create records manually.
Steps to create an Emailing list

1. Click on Campaigns tab
2. In the detail view of desired Campaign record, click on **Contacts** from related modules list
3. Click **Select One** drop-down to select from existing filters, and click **Load List** button
4. Click **Select Contacts** button to select from existing records
5. Click **Add Contact** to add from existing Contacts
6. After your list is finalized, click **Send email** button to start sending emails

12. Projects

What is a Project?

Project is a planned work that involves specific goals, start date and target end date, budgets, progress etc. Comments will help you to collaborate among users. You can also track the issues identified and fixed by associating projects with Tickets module.

Creating Projects Manually

You can enter Project details manually from Projects Module. This might come handy if you will have to enter Project details individually.
Steps to create Project records manually

1. In Projects tab, click on **Add Project** button
2. In the Create Project view, fill in the project details
3. Click **Save**

Quick Create

You can enter basic details of Project record through Quick create. This might be helpful if you are running out of time.

Steps to create Project records through Quick create

1. Click (+) Icon on top right corner
2. Click **Project**
3. In the Create Project view, fill in the project details
4. Click **Save**

Importing Projects from Existing files

Prism SalesPRO CRM supports importing Projects from external sources such as .csv and vcf files. As it saves lots of time and efforts, it might come in really helpful for your team to import thousands of records instantly.

Exporting Projects to External Source

If you ever want your data in the form of a spreadsheet, you can export your Projects records right away.
Steps to export your data

1. Click Projects tab
2. Click **Actions** button > **Export**
3. In the Export Records page, you will find the following options

Export selected records	Click on the radio button to export the records selected in List view
Export data in current page	Click on the radio button to export all the records that are on the current list view page
Export all data	Click on the radio button to export all records in Projects Module

4.Click **Export Projects** button.

Managing Projects

#	List of operations you can perform on records in Projects Home page
1	Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria.
2	Click on **Actions** button and perform actions on desired records like: **Edit** and **Delete**
3	Click Settings button > **Edit Fields** to configure fields and customize the layout of fields through Layout Editor
4	Click Settings button > **Edit Workflows** to view / create new Workflows on Projects
5	Click Settings button > **Edit Picklist values** to modify picklist values through Picklist Editor
6	Search desired records

#	List of operations you can perform on records in detail view of Project record
1	Click **Edit** button to modify existing content.
2	Click **More** > **Delete** to delete the existing Project record
3	Click **More** > **Duplicate** to clone existing Project record
4	Click **More** > **Add Project Task** to start creating a Project Task
5	Click **More** > **Add Note** to start creating a new document
6	Click **More** > **View History** to see the list of operations done on Project record

Fields Information

Information of fields in the Projects module.

Project Name	Provide name of the project. This field is mandatory.
Start Date	Specify the project start date
Target End Date	Provide tentative project end date
Actual End Date	Provide actual end date after the project is completed
Status	Provide the status of the project
Progress	Provide the progress on project advancement
Target Budget	Provide anticipated revenues for the project

Associating Projects with Other Records

This will display all-round view of relations of Projects module with other modules and maintains log of complete history.

You can keep track of following details in Projects Module

Comments	To view all the comments exchanged across different users
Updates	Displays history of actions performed on Project record like Project Tasks, Project Milestones, Tickets etc
Project Tasks	View existing Project Tasks or create new Project Task and associate with Project record
Project Milestones	View existing Project Milestones or create new Project Milestones and associate with Project record
Documents	Notes added to Project record will be displayed as Documents.
Trouble Tickets	To view cases(Trouble Tickets) associated with Project record
Charts	To view graphical representation on how Project is advancing
Events and To Do	To view activities scheduled to accomplish a Project

Note!.The Charts in the Projects module are displayed basing upon the **Progress** field in Project Tasks module.

13. Products

What is a Product?

Products represent stock of goods in your Inventory. Products can be either procured from your suppliers or rendered to your customers depending upon nature of your Organization. Interestingly, if your company manages both selling and purchasing goods, Products module will act as a bridge between Sales and Purchase departments.

Create Products Manually

You can enter Product details manually from Products Module. This might come handy if you will have to enter Product details individually.
Steps to create Product records manually

1. In **Products** tab, click on **Add Product** button
2. In the Create Product view, fill in the Product details
3. Click **Save**

Quick Create

You can enter basic details of Product record through Quick create. This might be helpful if you are running out of time.

Steps to create Product records through Quick create

1. Click (+) Icon on top right corner
2. Click **Product**
3. In the Create Product view, fill in the Product details
4. Click **Save**

Import existing data

If you have your data in .csv or .vcf format, you can import thousands of records instantly and effectively. *Prism SalesPRO CRM* supports importing data into different modules including Leads, Contacts, Organizations, Opportunities, etc.

Check List

1. Mandatory Fields
Make sure your file addresses all mandatory fields. For instance, **Last Name** and **Company** fields are mandatory in Leads module. You cannot proceed with importing until or unless you have a value within these fields of your .csv file. If the value of mandatory fields is empty, they will be set to '????'.

2. File Size
Make sure the file to be imported do not exceed 5 MB size

3. Permissions

Admin users can disable import access to non-admin users from Profile level. If you can't find the Import option, you should contact your Administrator to enable import permission for your profile

Getting Started

This tutorial will walk you through different steps involved in importing records into your *Prism SalesPRO CRM* account. The entire process is simple and straightforward.

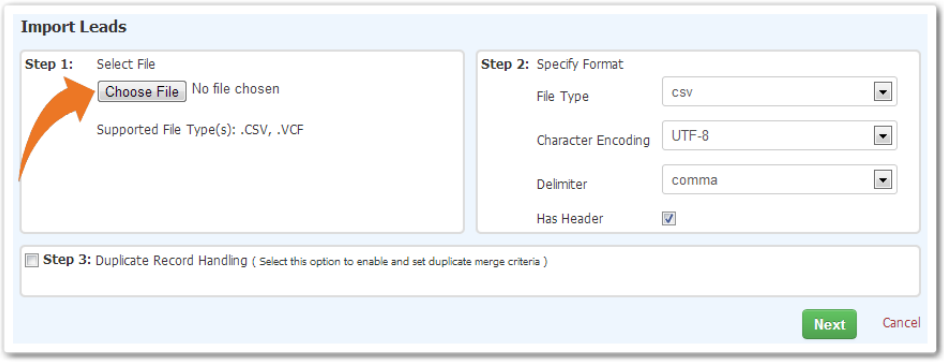
Follow few simple steps to import data into *Prism SalesPRO CRM*

1. Click [Module] tab. Eg: Leads, Contacts, etc
2. Click **Actions** > **Import**

Step 1: Select File

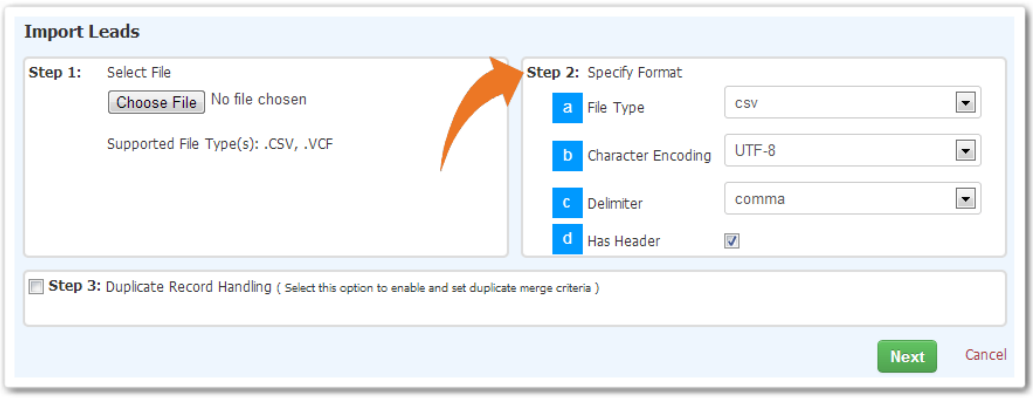
In the first step of importing process, you'll need to browse and upload your import file from your machine.

Here's how to select your.csv file
Click on the **Choose File** button, browse for desired file that is to be imported. Csv and vcf are the two file formats currently supported.



Step 2: Specify Format

In the second step of importing process, you'll need to specify import file properties. The details of each property are explained below.



a. File Type: *Prism SalesPRO*supports two different file types namely: .csv and .vcf. Select the appropriate value from the **File Type** dropdown that describes the format of the file you've selected in Step:1. For instance, if you've uploaded .csv file, select .csv from **File Type** field.

b. Character Encoding: Make sure you select the right character set in which your import file has been encoded. You'll need to select right encoding of the file irrespective of the file contents.

c. Delimiter: *Prism SalesPRO CRM* supports comma (,) and semicolon(;) as field delimiters. The fields in your .csv file are recognized only if they are separated with delimiters. More often, in a csv file, fields are separated with commas (,).

d. Header: While importing, the header of your .csv file is compared with fields in *Prism SalesPRO CRM*. Having a header makes it easy for you to map fields. Click on **Has Header**checkbox if your file has a header. First row of your csv file is considered as a header. Please make sure that you uncheck the **Has Header** field if your file doesn't have a header.

File with header

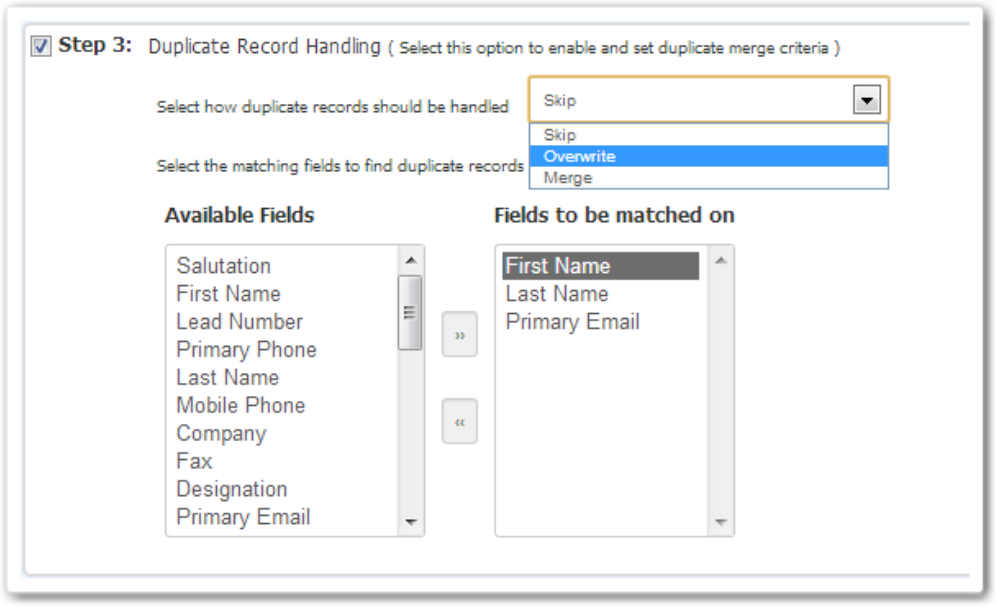
B	C	D
First Name	Last Name	Organization Name
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

File with no header

B	C	D
David	Hocking	Google
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

Step 3: Duplicate Record Handling

This is an optional step and comes into play if you would enable the checkbox in Step-3 of the import process. This option will help you in tracing out duplicate records. You can also configure the actions to be performed on duplicate records: skip, overwrite and merge. And finally, select desired fields for duplicate lookup by moving fields from the list of **Available Fields** to **Fields to be matched on** by using the right and left arrows.



Following actions can be performed on duplicate records

Skip: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, duplicate records in .csv file are not imported into *Prism SalesPRO CRM*.

Overwrite: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, the records in .csv file are imported and replaced with records in *Prism SalesPRO CRM*.

Merge: After import, duplicate records are identified based on fields criteria. Merge, unlike overwrite and skip, checks for duplicate records first and then captures only useful information from your .csv file and updates it in your *Prism SalesPRO CRM*. Learn more

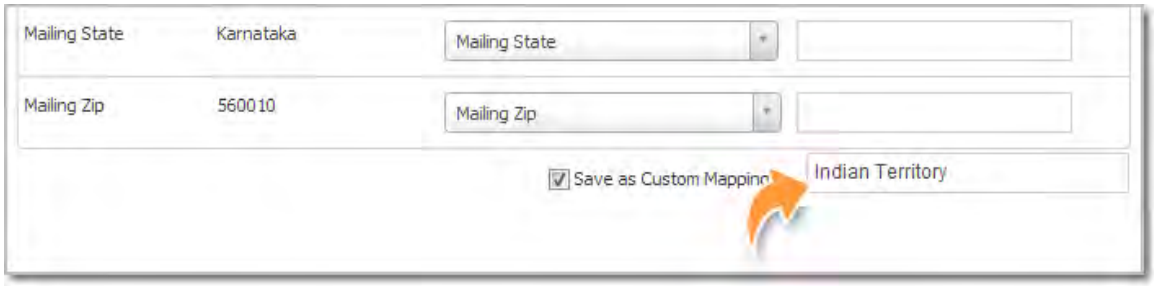
Here's a sample image that depicts how all these properties work

Step 4: Map CRM Fields

In the final step of import process, you will need to map import file Header/Column to fields in *Prism SalesPRO CRM*. Fields will be automatically mapped if your csv file's header matches with *Prism SalesPRO CRM* field label. Here's a list of helpful tips before you get started.

You can provide default values for mapping fields which will be picked up in case if the value for any field in file will be empty.

Also, frequently used mappings can be saved and reused.

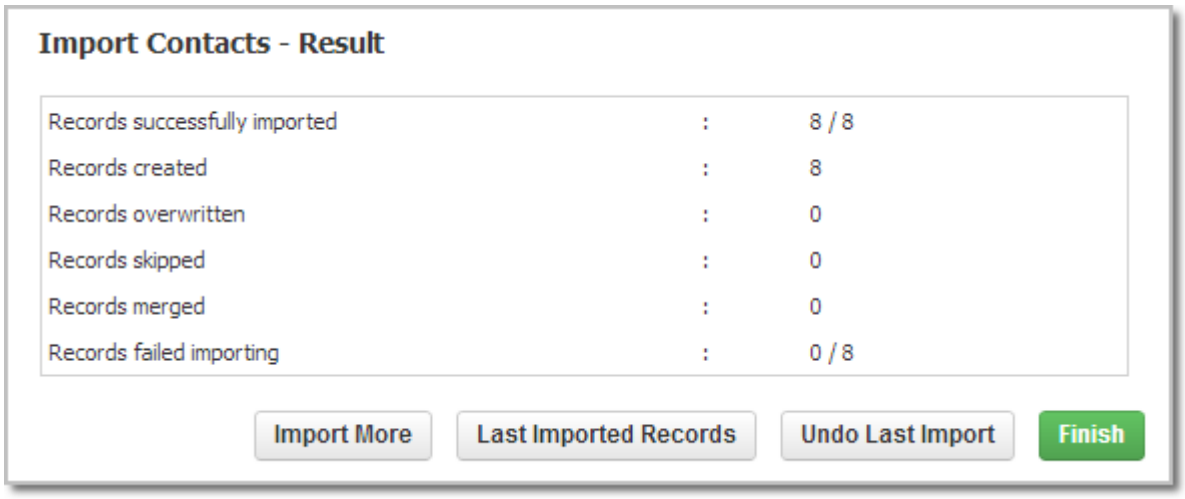


Saved mappings will be accessible across all users. You can delete the saved mappings by clicking on Trash icon.

After successfully mapping fields, click **Import** button.

Import Results

After successfully importing records into *Prism SalesPRO CRM*, the import results are displayed in tabular format



- **Import More**

  Lets you start all new import again

  - **Last Imported Records**

    Displays records imported lately with the help of paging support.

    - **Undo Last Import**

    Deletes all records that are created during the last import session. Reference records related to other modules will not be deleted.

Notifications

Import Scheduled!
If you have more than 1000 records in your file, your import will be scheduled on cron which is configured to run once in every 15 minutes. If you have configured your Outgoing Server and Email id properly, an email notification will be sent to you after successful import
Data Corruption Error
This error shows up when the import is interrupted for various reasons like crashing in between, or canceled by a user etc. This error indicates that the import table still has records to be imported into the system, but all the information related to the import (like mapping, default values, merge criteria) are all lost. So these records can no more be imported and the user needs to clear this data before starting any other import.
Import Locked Error
This error will be displayed if the import has been already been started on the same module by any other user in *Prism SalesPRO CRM*. The details of the module, the user, and the time at which the Import has been locked is detailed within the error message itself.
Import Interrupted Error
If an Admin user is performing import and if a non-admin user tries to start an import on the same module, he will get to see the Import Locked error. If non-admin user is doing import, and Admin user attempts to

import on the same module, same time, he can be able to see the status of the current import and he will even have powers to cancel the current import; Consequently, the Import Interrupted Error will be displayed to non-admin user.

Attention!
1.If you would start importing in one particular module, you cannot import records into the same or any other module in *Prism SalesPRO CRM*.

2.If you would trigger import on a particular module, neither you nor any other user in *Prism SalesPRO CRM* can import records into the same module. However, other users can import records into other modules in *Prism SalesPRO CRM*.

Managing Products

#	List of operations you can perform on records in Products Home page
1	Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria.
2	Click on **Mass Actions** button and perform actions on desired records like: **Edit** and **Delete**
3	Click Settings button > **Edit Fields** to configure fields and customize the layout of fields through Layout Editor
4	Click Settings button > **Edit Workflows** to view / create new Workflows on Products
5	Click Settings button > **Edit Picklist values** to modify picklist values through Picklist Editor
6	Search desired records

#	List of operations you can perform on records in detail view of Product record
1	Click **Edit** button to modify existing content.
2	Click **More** > **Delete** to delete the existing Product record
3	Click **More** > **Create Quote** to start creating a new Quote on the Product record
4	Click **More** > **Create Invoice** to start creating a new Invoice on the Product record
5	Click **More** > **Create Sales Order** to start creating a new Sales Order on the Product record
6	Click **More** > **Create Purchase Order** to start creating a new Purchase Order on the Product record

Exporting Products to External Source

If you ever want your data in the form of a spreadsheet, you can export your Products records right away.

Steps to export your data

1. Click Products tab
2. Click More button > Export
3. In the Export Records page, you will find the following options

Export selected records	Click on the radio button to export the records selected in List view
Export data in current page	Click on the radio button to export all the records that are on the current list view page
Export all data	Click on the radio button to export all records in Products Module

4. Click **Export Products** button.

Fields Information

Information of fields in the Products module.

Product Name	Provide name of the product. This field is mandatory.
Product Active	Enable the check-box if product is available
Sales Start Date	Specify start date of sales
Sales End Date	Specify sales end date
Support Start Date	Specify the support start date
Support End Date	Specify the support end date
Vendor Name	Select the name of the product vendor
Unit Price	Specify the price of the Product. You can imply different taxes and work with different currencies. Learn more
Handler	Select from the users or group to specify Product owner

Qty. in Stock	Specify the Quantity of stock present in the Inventory
Product Image	Provide a image to your product

Note!
The **Quantity in Stock** field shows the units of stock present in inventory. If you would generate an **Invoice** on the product, the quantity in the stock will be reduced. If you would generate a **Purchase Order** on the product and status has reached to Received Shipment, the Quantity in the Stock field will be increased and field values will be updated automatically.

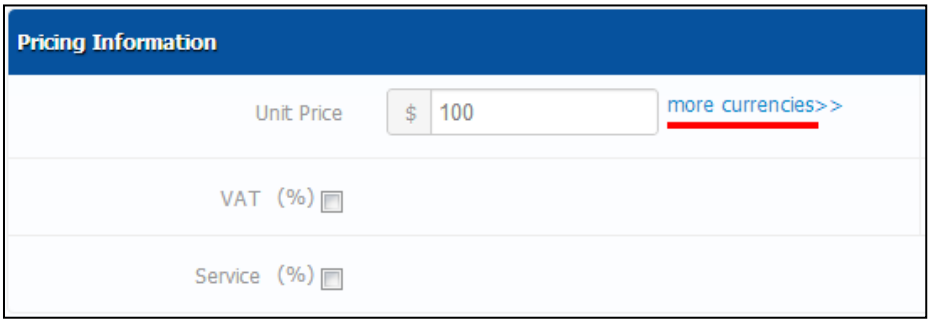
Select Products

While creating Invoices, Sales Orders, Purchase Orders and Quotes, click on Products Icon, highlighted below, to select from existing products. Also, click on **Add Products** button to include more products.

Dealing with Currencies and Taxes

Manage International Currencies

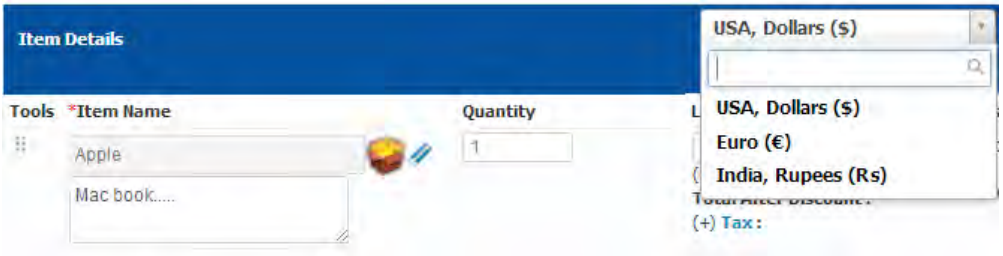
In the create view of a Product, you can be able to set multiple currencies for its use while generating Invoices, Sales Orders, Purchase Orders and Quotes. To achieve this, fill **Unit Price** field and click on **more currencies** link. You can find it under Pricing Information block.



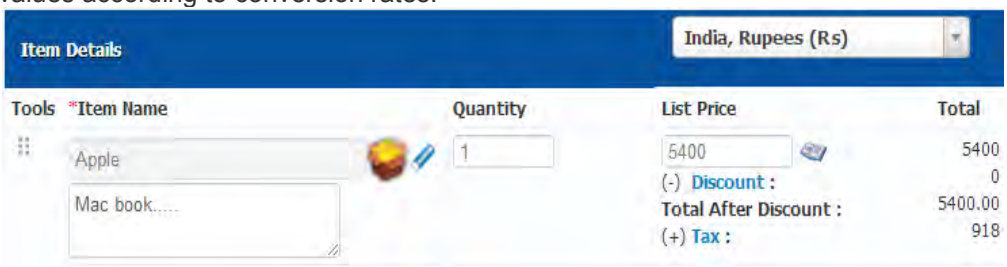
Product Prices popup will be displayed on your screen. This will display the list of different currencies.

Currency	Displays the list of currencies you configured. Enable the check-box to manage operations on desired currency
Price	Prices are updated according to the conversion rates. However, you can modify the prices according to your requirements
Conversion Rate	Displays the values according to conversion rates
Reset Price	Reverts back the modified currency values to default values according to conversion rates
Base Currency	Select the radio button of desired currency to make it a base currency. Comes handy while managing international currencies

In the create view of Invoices, Sales Orders, Purchase Orders and Quotes, select desired currency.

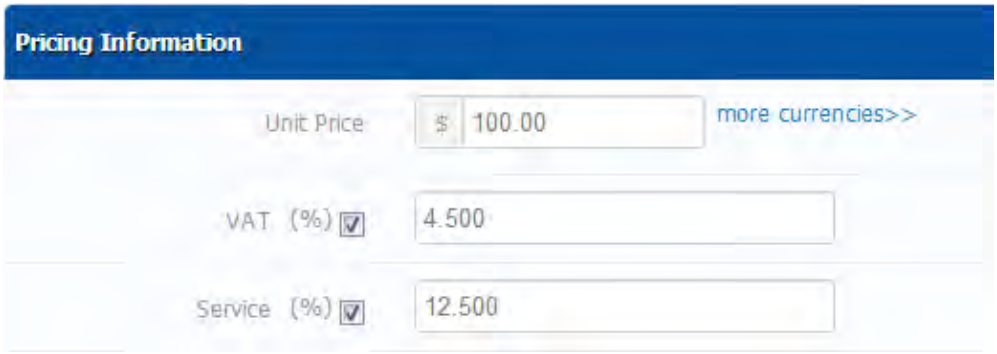


Automatically, the values modified lately in the Product will be updated instead of updating the values according to conversion rates.



Imply Taxes

In the create or edit view of a Product, you can find the taxes under Pricing Information block. Values will be automatically populated if you would enable the check-boxes. You can make modifications in tax values for products individually.



This feature comes into action if you would select **Tax Mode** as **Individual** while creating Invoices, Sales Orders, Purchase Orders and Quotes. The tax values modified lately in Product record will be displayed instead of populating taxes from Tax Calculations.

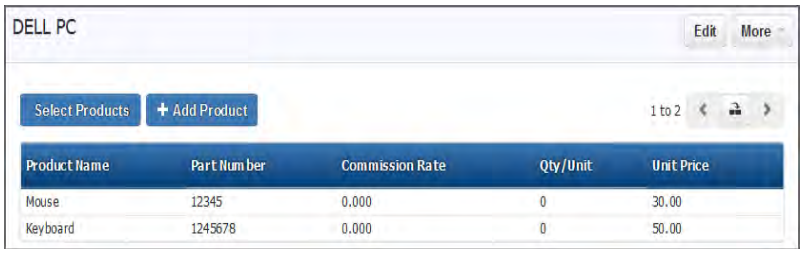
Product Bundles

This feature helps you to have sub-products for products. While creating Sales Orders, Purchase Orders, Invoices and Quotes, upon selecting parent product, all sub products are automatically selected into the cart.

Selecting sub-products under parent product

Follow few simple steps to select sub-products under parent product

1. Click **All** drop-down in menu bar
2. Click **Products**
3. Click on desired product. (The parent product)
4. In the detail view of parent product, click **Product Bundles** in the right
5. Click on **Add Product** or **Select Products** to create new product, and select from existing products respectively



After successfully creating a product bundle, the parent product and sub-products under it are ready for selection under Invoices, PO, SO and Quotes.
For instance, we will add product bundle on an invoice record

1. Click **All** drop-down
2. Click **Invoices**
3. In the Item Details block, select parent product. All sub-products associated with parent product are added automatically.

Notes!
1. Price of sub-products doesn't affect the Net Price in Invoices, Quotes, SO and PO
2.The quantity of sub products is reduced when an invoice is generated on parent product

14. Services

What is a Service?

Services refer to the free or paid assistance you would offer to benefit your customers. In general, services are non-stock items rendered to your customers. Services do not have bundles.

Create Services Manually

You can enter Service details manually from Services module. This might come handy if you will have to enter Service details individually.
Steps to create Service records manually

1. In **Services** tab, click on **Add Service** button
2. In the Create Service view, fill in the Service details
3. Click **Save**

Quick Create

You can enter basic details of Service record through Quick create. This might be helpful if you are running out of time.
Steps to create Service records through Quick create

1. Click (+) Icon on top right corner
2. Click **Service**
3. In the Create Service view, fill in the Service details
4. Click **Save**

Import existing data

If you have your data in .csv or .vcf format, you can import thousands of records instantly and effectively. *Prism SalesPRO CRM* supports importing data into different modules including Leads, Contacts, Organizations, Opportunities, etc.

Check List

1. Mandatory Fields Make sure your file addresses all mandatory fields. For instance, **Last Name** and **Company** fields are mandatory in Leads module. You cannot proceed with importing until or unless you have a value within these fields of your .csv file. If the value of mandatory fields is empty, they will be set to '????'.

2. File Size Make sure the file to be imported do not exceed 5 MB size

3. Permissions Admin users can disable import access to non-admin users from Profile level. If you can't find the Import option, you should contact your Administrator to enable import permission for your profile

Getting Started

This tutorial will walk you through different steps involved in importing records into your *Prism SalesPRO CRM* account. The entire process is simple and straightforward.

Follow few simple steps to import data into *Prism SalesPRO CRM*

1. Click [Module] tab. Eg: Leads, Contacts, etc
2. Click **Actions** > **Import**

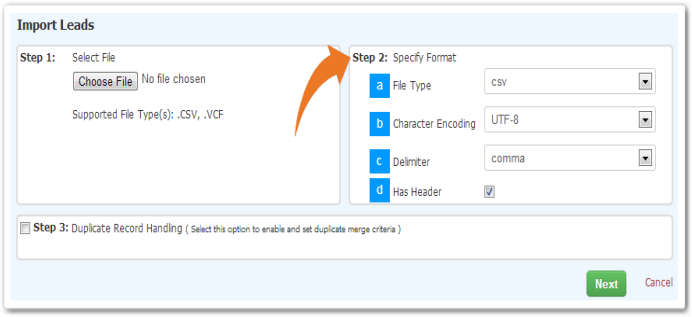
Step 1: Select File

In the first step of importing process, you'll need to browse and upload your import file from your machine.

Here's how to select your.csv file
Click on the **Choose File** button, browse for desired file that is to be imported. Csv and vcf are the two file formats currently supported.

Step 2: Specify Format

In the second step of importing process, you'll need to specify import file properties. The details of each property are explained below



a. File Type: *Prism SalesPRO*supports two different file types namely: .csv and .vcf. Select the appropriate value from the **File Type** dropdown that describes the format of the file you've selected in Step:1. For instance, if you've uploaded .csv file, select .csv from **File Type** field.

b. Character Encoding: Make sure you select the right character set in which your import file has been encoded. You'll need to select right encoding of the file irrespective of the file contents.

c. Delimiter: *Prism SalesPRO CRM* supports comma (,) and semicolon(;) as field delimiters. The fields in your .csv file are recognized only if they are separated with delimiters. More often, in a csv file, fields are separated with commas(,)

d. Header: While importing, the header of your .csv file is compared with fields in *Prism SalesPRO CRM*. Having a header makes it easy for you to map fields. Click on **Has Header**checkbox if your file has a header. First row of your csv file is considered as a header. Please make sure that you uncheck the **Has Header** field if your file doesn't have a header.

File with header

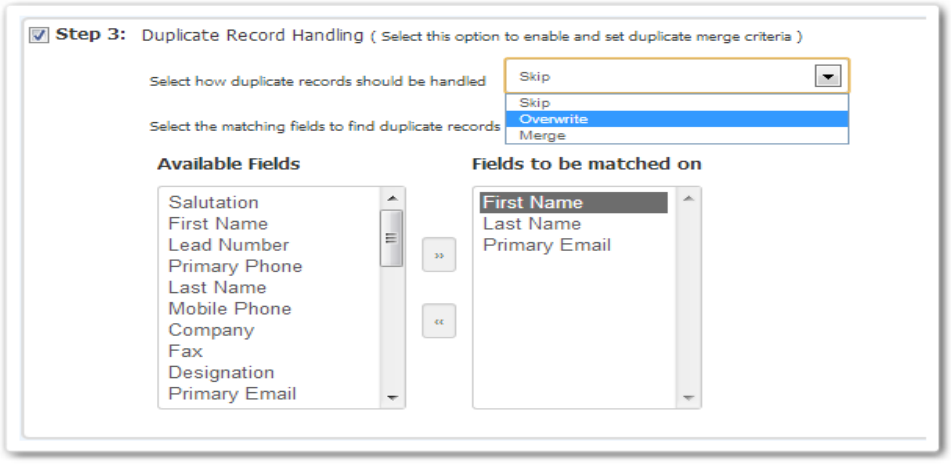
B	C	D
First Name	Last Name	Organization Name
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

File with no header

B	C	D
David	Hocking	Google
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

Step 3: Duplicate Record Handling

This is an optional step and comes into play if you would enable the checkbox in Step-3 of the import process. This option will help you in tracing out duplicate records. You can also configure the actions to be performed on duplicate records: skip, overwrite and merge. And finally, select desired fields for duplicate lookup by moving fields from the list of **Available Fields** to **Fields to be matched on** by using the right and left arrows.



Following actions can be performed on duplicate records

Skip : After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, duplicate records in .csv file are not imported into *Prism SalesPRO CRM*.

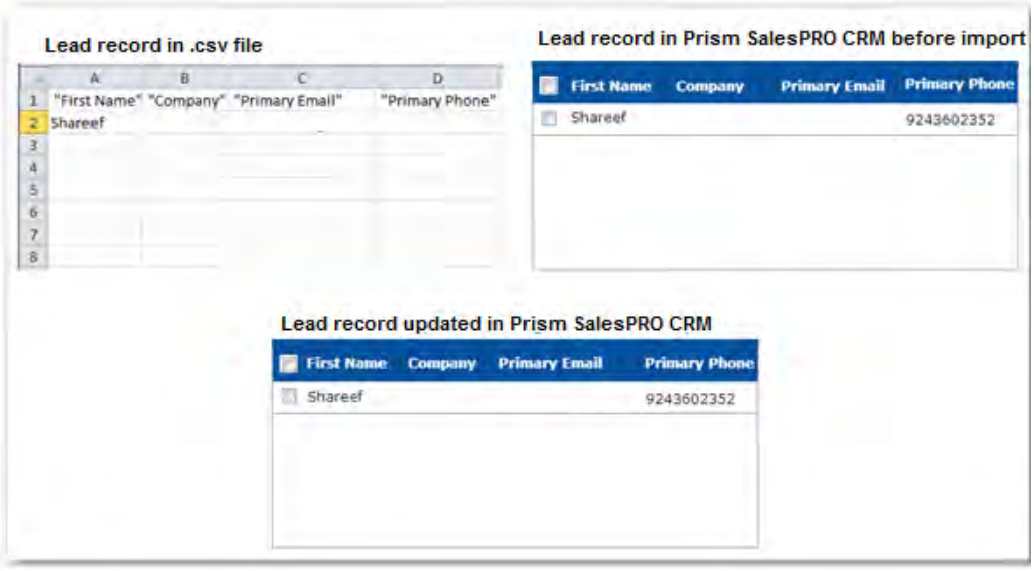
Overwrite : After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, the records in .csv file are imported and replaced with records in *Prism SalesPRO CRM*.

Merge : After import, duplicate records are identified based on fields criteria. Merge, unlike overwrite and skip, checks for duplicate records first and then captures only useful information from your .csv file and updates it in your *Prism SalesPRO CRM*.

Duplicate Merge Importing

Sometimes finding and eliminating duplicates is not your agenda. Skip and overwrite options do not simply meet your requirements because their operation is based on records as whole. What if your records on either ends(csv file and PrismSalesPro) have duplicates but also have important information on those duplicates? That's exactly when merge comes really helpful. Merge feature finds out duplicates and converge information in .csv file and *Prism SalesPRO CRM*; that makes it only one record with complete information.

Let's look at an example:


Lead record in .csv file
A B C D
1 "First Name" "Company" "Primary Email" "Primary Phone"
2 Shareef
Lead record in Prism SalesPRO CRM before import
First Name Company Primary Email Primary Phone
Shareef 9243602352
Lead record updated in Prism SalesPRO CRM
First Name Company Primary Email Primary Phone
Shareef 9243602352

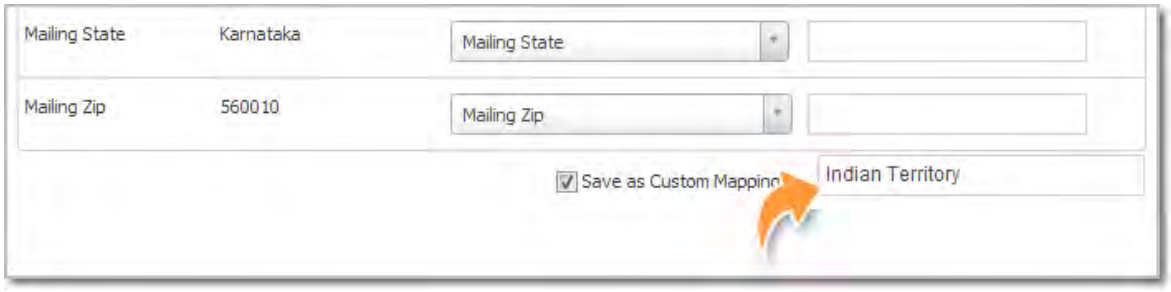
Lookup is done to check whether records have same field information. If field values are all same, records in csv file are not imported into *Prism SalesPRO CRM*. Besides that, interestingly, if same field on csv file and *Prism SalesPRO*has different values, csv file wins. That means the information on csv file will be updated in *Prism SalesPRO CRM*. Also, if *Prism SalesPRO*has a field with null(empty) value, the field value from csv file will be updated in *Prism SalesPRO CRM*.

Step 4: Map CRM Fields

In the final step of import process, you will need to map import file Header/Column to fields in *Prism SalesPRO CRM*. Fields will be automatically mapped if your csv file's header matches with *Prism SalesPRO CRM* field label. Here's a list of before you get started.

You can provide default values for mapping fields which will be picked up in case if the value for any field in file will be empty.

Also, frequently used mappings can be saved and reused.



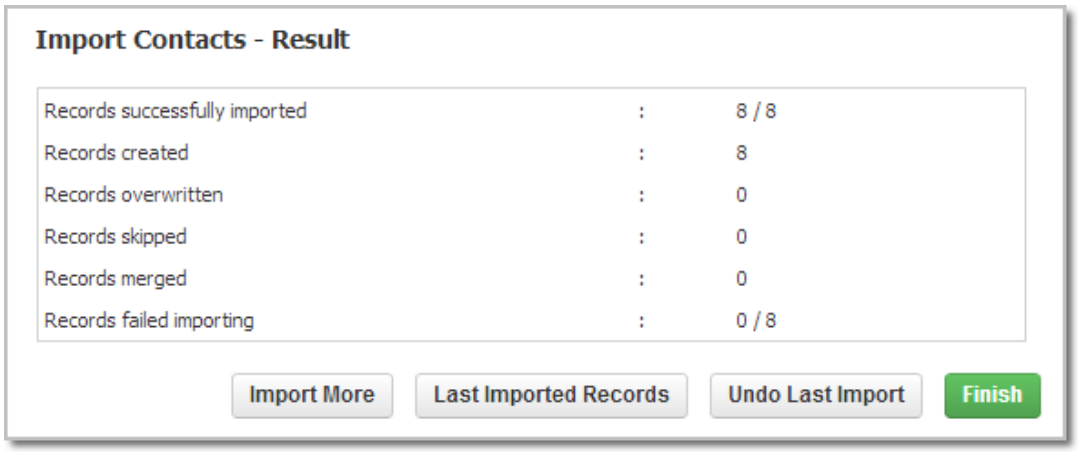
Saved mappings will be accessible across all users. You can delete the saved mappings by clicking on Trash icon.

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

After successfully mapping fields, click **Import** button.

Import Results

After successfully importing records into *Prism SalesPRO CRM*, the import results are displayed in tabular format



- **Import More**

  Lets you start all new import again

- **Last Imported Records**

  Displays records imported lately with the help of paging support.

- **Undo Last Import**

  Deletes all records that are created during the last import session. Reference records related to other modules will not be deleted.

Notifications

Import Scheduled! If you have more than 1000 records in your file, your import will be scheduled on cron which is configured to run once in every 15 minutes. If you have configured your Outgoing Server and Email id properly, an email notification will be sent to you after successful import

Data Corruption Error

This error shows up when the import is interrupted for various reasons like crashing in between, or canceled by a user etc. This error indicates that the import table still has records to be imported into the system, but all the information related to the import (like mapping, default values, merge criteria) are all lost. So these records can no more be imported and the user needs to clear this data before starting any other import.

Import Locked Error

This error will be displayed if the import has been already been started on the same module by any other user in *Prism SalesPRO CRM*. The details of the module, the user, and the time at which the Import has been locked is detailed within the error message itself.

Import Interrupted Error

If an Admin user is performing import and if a non-admin user tries to start an import on the same module, he will get to see the Import Locked error. If non-admin user is doing import, and Admin user attempts to import on the same module, same time, he can be able to see the status of the current import and he will even have powers to cancel the current import; Consequently, the Import Interrupted Error will be displayed to non-admin user.

Attention!

If you would start importing in one particular module, you cannot import records into the same or any other module in *Prism SalesPRO CRM*.

If you would trigger import on a particular module, neither you nor any other user in *Prism SalesPRO CRM* can import records into the same module. However, other users can import records into other modules in *Prism SalesPRO CRM*.

Managing Services

#	List of operations you can perform on records in Services Home page
1	Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria.
2	Click on **Mass Actions** button and perform actions on desired records like: **Edit** and **Delete**
3	Click Settings button > **Edit Fields** to configure fields and customize the layout of fields through Layout Editor

4	Click Settings button > **Edit Workflows** to view / create new Workflows on Services
5	Click Settings button > **Edit Picklist values** to modify picklist values through Picklist Editor
6	Search desired records

#	**List of operations you can perform on records in detail view of Service record**
1	Click **Edit** button to modify existing content.
2	Click **More** > **Delete** to delete the existing Service record
3	Click **More** > **Create Quote** to start creating a new Quote on the Service record
4	Click **More** > **Create Invoice** to start creating a new Invoice on the Service record
5	Click **More** > **Create Sales Order** to start creating a new Sales Order on the Service record
6	Click **More** > **Create Purchase Order** to start creating a new Purchase Order on the Service record

Exporting Services to External Source

If you ever want your data in the form of a spreadsheet, you can export your Services records right away.

Steps to export your data

1. Click Services tab
2. Click More button > Export
3. In the Export Records page, you will find the following options:

Export selected records	Click on the radio button to export the records selected in List view
Export data in current page	Click on the radio button to export all the records that are on the current list view page
Export all data	Click on the radio button to export all records in Services module

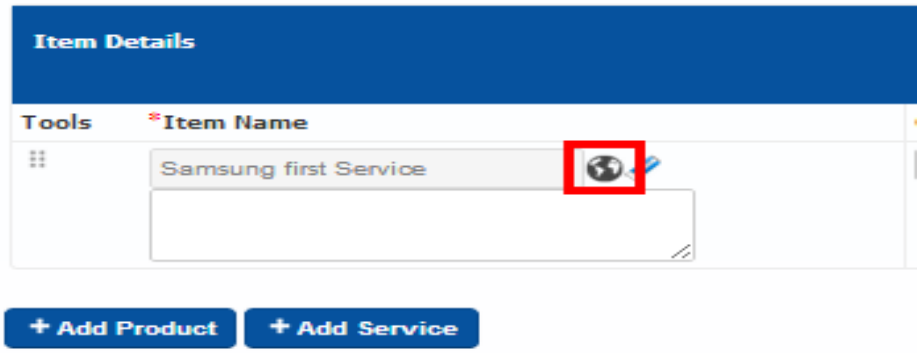
4. Click **Export Services** button.

Fields Information

Information of fields in the Services module.

Select Services

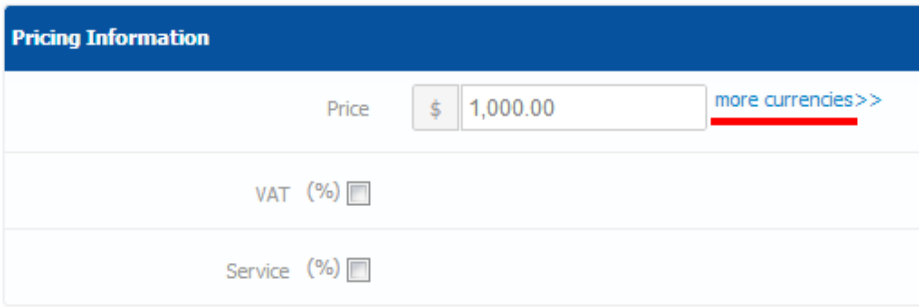
While creating Invoices, Quotes, Sales Orders, and Purchase Orders, click on Services Icon, highlighted below, to select from existing services. Also, click on **Add Services** button to include more services.



Dealing with Currencies and Taxes

Manage International Currencies

In the create view of a Service, you can be able to set multiple currencies for its use while generating Business Orders. To achieve this, fill **Price** field and click on **more currencies** link. You can find it under Pricing Information block.

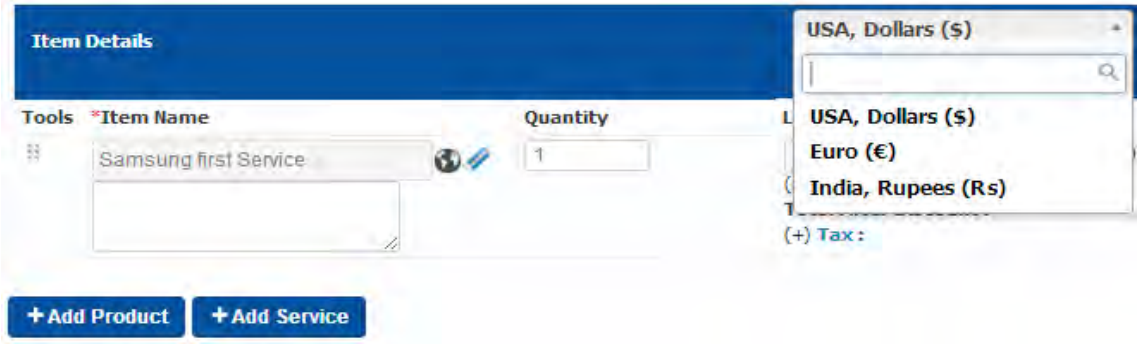


Service Prices popup will be displayed on your screen. This will display the list of different currencies.

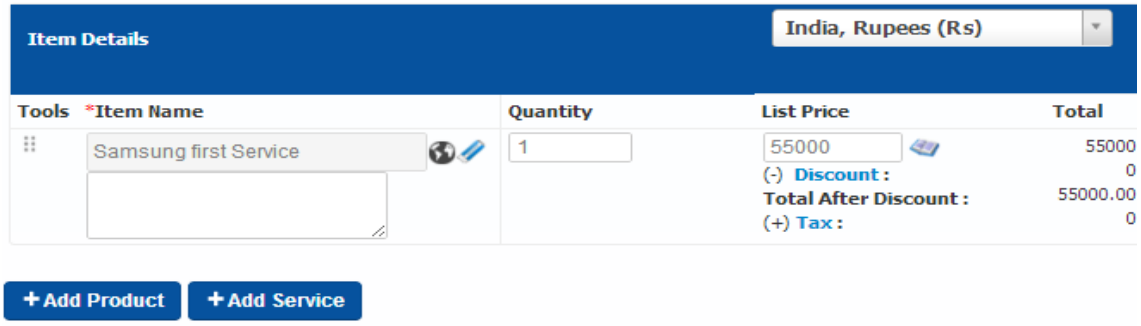
Currency	Displays the list of currencies you configured. Enable the check-box to manage operations on desired currency

Price	Prices are updated according to the conversion rates. However, you can modify the prices according to your requirements
Conversion Rate	Displays the values according to conversion rates
Reset Price	Reverts back the modified currency values to default values according to conversion rates
Base Currency	Select the radio button of desired currency to make it a base currency. Comes handy while managing international currencies

In the create view of Invoices, Quotes, Sales Orders, and Purchase Orders, select desired currency.

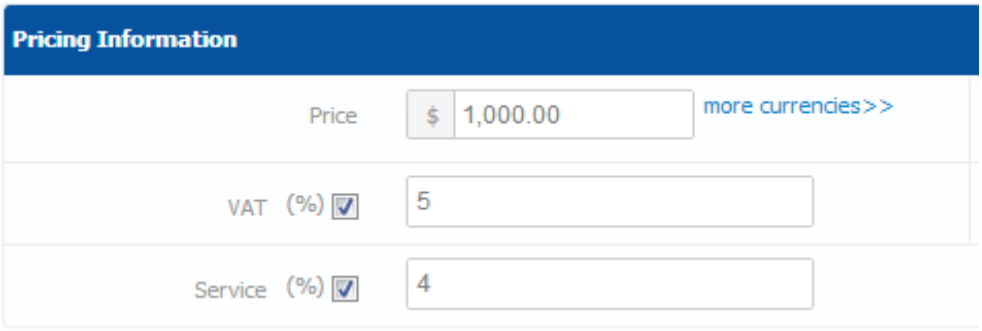


Automagically, the values modified lately in the Service will be updated instead of updating the values according to conversion rates.

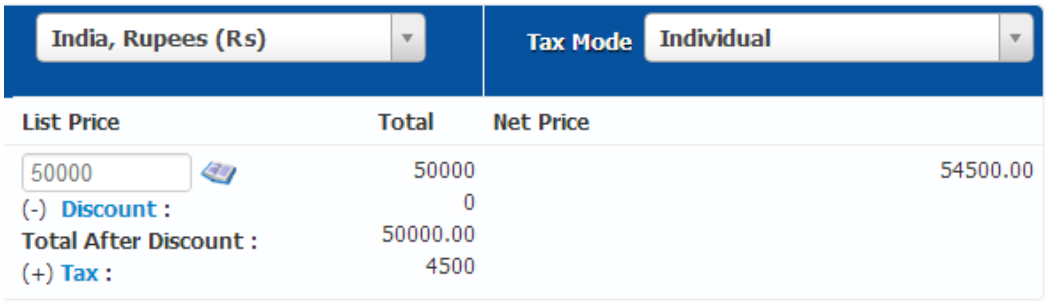


Imply Taxes

In the create or edit view of a Service, you can find the taxes under Pricing Information block. Values will be automatically populated if you would enable the check-boxes. You can make modifications in tax values for services individually.



This feature comes into action if you would select **Tax Mode** as **Individual** while creating business orders. The tax values modified lately in Service record will be displayed instead of populating taxes from Tax Calculations.



15. Price Books

What is a Price Book?

Price Books gives you the ability to attribute different prices for products. As it gives control over the pricing, you can vary prices at any time; As a result, you can always offer best price to delight your customers.

Create Price Books Manually

You can enter Price Book details manually from Price Books Module. This might come handy if you will have to enter Price Book details individually.
Steps to create Price Book records manually

1. In Price Books tab, click on **Add Price Book** button
2. In the Create Price Book view, fill in the details
3. Click **Save**

Quick Create

You can enter basic details of Price Book record through Quick create. This might be helpful if you are running out of time.
Steps to create Price Book records through Quick create

1. Click (+) Icon on top right corner
2. Click **Price Book**
3. In the Create Price Book view, fill in the Price Book details
4. Click **Save**

Managing Price Books

#	List of operations you can perform on records in Price Books Home page
1	Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria.
2	Click on **Mass Actions** button and perform actions on desired records like: **Edit** and **Delete**
3	Click Settings button > **Edit Fields** to configure fields and customize the layout of fields through Layout Editor
4	Click Settings button > **Edit Workflows** to view / create new Workflows on Price Books
5	Click Settings button > **Edit Picklist values** to modify picklist values through Picklist Editor
6	Search desired records

#	List of operations you can perform on records in detail view of Price Book record
1	Click **Edit** button to modify existing content.
2	Click **More** > **Delete** to delete the existing Price Book record
3	Click **More** > **Duplicate** to clone the existing Price Book record

Working with Price Books

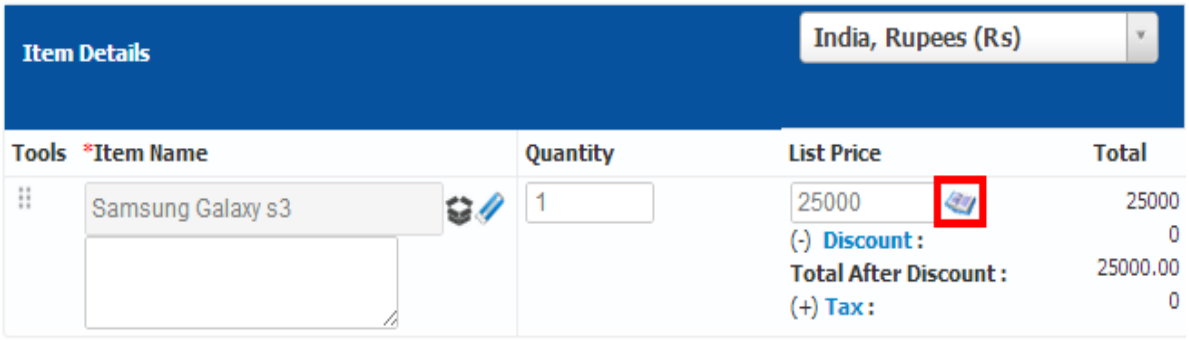
You can modify the list price of Product or a Service to suite different customer groups.

1. **Unit Price**: Predefined price fixed by manufacturer.
2. **List Price**: Price that can be varied by the Seller.

Steps to associate Price Books with Products and Services.

1. Click desired Price Book record.
2. Click **Products** in related modules list in detail view
3. Click **Select Products** button
4. Click check-box of desired product and modify **List Price**
5. Click **Add to Price Books** button.

While creating Invoices, Sales Orders, Purchase Orders and Quotes, you can select the price books by clicking on icon highlighted below. This can be found in Item Details block.



16. Trouble Tickets

What is a Trouble Ticket?

Trouble Tickets, also called as Cases, are post-sales support requests generated by your customers. It offers your sales team the flexibility to create, communicate, edit, and close the case after the right solution is delivered to your customers.

Create Trouble Tickets Manually

You can enter Trouble Ticket details manually from Trouble Tickets Module. This might come handy if you will have to enter Trouble Ticket details individually.
Steps to create Trouble Ticket records manually

1. In Trouble Tickets tab, click on **Add Trouble Ticket** button
2. In the Create Trouble Ticket view, fill in the Trouble Ticket details
3. Click **Save**

Quick Create

You can enter basic details of Trouble Ticket record through Quick create. This might be helpful if you are running out of time.
Steps to create Trouble Ticket records through Quick create

1. Click (+) Icon on top right corner
2. Click **Trouble Ticket**
3. In the Create Trouble Ticket view, fill in the Trouble Ticket details
4. Click **Save**

Getting Started

Trouble Tickets provides a great way to handle cases. You might need to create a case upon a Product, Contact or an Organization. You can do all that while Creating a new Trouble Ticket or Editing an existing Ticket. Tickets are automatically assigned to the user that creates it. If you are not the concerned person, you can simply assign it to internal team through **Assigned to** field. You can set the working stages of a ticket through **Status** field in Trouble Tickets tab. Comments can be exchanged to communicate with your customers. These comments are sorted in chronological order.

Automatic Email Notifications

Interestingly, Email notifications are sent to Assigned to user, and related Contact and Organization. Notifications are sent when Ticket is created, Comments are exchanged or Status is changed to **Closed**. These emails are configured in Workflows.

Importing Trouble Tickets from Existing files

Prism SalesPRO CRM supports importing Trouble Tickets from external sources such as .csv and vcf files. As it saves lots of time and efforts, it might come in really helpful for your Sales Team to import thousands of records instantly.

Managing Trouble Tickets

#	List of operations you can perform on records in Trouble Tickets Home page
1	Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria.
2	Click on **Mass Actions** button and perform actions on desired records like: **Edit** and **Delete**
3	Click Settings button > **Edit Fields** to configure fields and customize the layout of fields through Layout Editor
4	Click Settings button > **Edit Workflows** to view / create new Workflows on Trouble Tickets
5	Click Settings button > **Edit Picklist values** to modify picklist values through Picklist Editor
6	Search desired records

#	List of operations you can perform on records in detail view of Trouble Ticket record
1	Click **Edit** button to modify existing content.
2	Click **More** > **Delete** to delete the existing Trouble Ticket record
3	Click **More** > **Duplicate** to clone the existing Trouble Ticket record
4	Click **More** > **Convert as FAQ**

Exporting Trouble Tickets to External Source

If you ever want your data in the form of a spreadsheet, you can export your Trouble Ticket records right away.
Steps to export your data

1. Click Trouble Tickets tab
2. Click More button > Export
3. In the Export Records page, you will find the following options

Export selected records	Click on the radio button to export the records selected in List view
Export data in current page	Click on the radio button to export all the records that are on the current list view page
Export all data	Click on the radio button to export all records in Trouble Tickets Module

4. Click **Export Trouble Tickets** button.

Associating Trouble Tickets with Other Records. This will display all-round view of relations of Trouble Tickets module with other modules and maintains log of complete history.

You can keep track of following details in Trouble Tickets Module

Activities	To schedule an Activity
Documents	To associate existing documents with Trouble Ticket record
Activity History	Displays all the Events and To dos that are completed or status changed as Held
Services	To Associate existing Services with Trouble Ticket record
Projects	To associate existing Projects with Trouble Ticket record
Service Contracts	To associate existing Service Contracts and track customer support Instances

17. Assets

What is an Asset?

Assets are tangible or intangible resources that are rendered to your customers. When products are shipped to customers, information of individual product item like: Product Number, Serial Number, Date Sold, Customer Name etc are stored in *Prism SalesPRO CRM* as Asset records. With Assets, it becomes easy for your support center to audit individual product items, and cases resolved upon them.

Create Assets Manually

You can enter Asset details manually from Assets Module. This might come handy if you will have to enter Asset details individually.
Steps to create Asset records manually

1. In Assets tab, click on **Add Asset** button
2. In the Create Asset view, fill in the details
3. Click **Save**

Quick Create

You can enter basic details of Asset record through Quick create. This might be helpful if you are running out of time.
Steps to create Asset records through Quick create

1. Click (+) Icon on top right corner
2. Click **Asset**
3. In the Create Asset view, fill in the Asset details
4. Click **Save**

Exporting Assets to External Source

If you ever want your data in the form of a spreadsheet, you can export your Assets records right away.
Steps to export your data

1. Click **Assets** tab

2. Click **More** button > **Export**

3. In the Export Records page, you will find the following options

Export selected records	Click on the radio button to export the records selected in List view
Export data in current page	Click on the radio button to export all the records that are on the current list view page
Export all data	Click on the radio button to export all records in Assets Module

4. Click **Export Assets** button.

Managing Assets

#	List of operations you can perform on records in Assets Home page
1	Create Custom filters to classify records as per your requirements. You can be able to limit your search to selected columns and search criteria.
2	Click on **Mass Actions** button and perform actions on desired records like: **Edit** and **Delete**
3	Click Settings button > **Edit Fields** to configure fields and customize the layout of fields through Layout Editor
4	Click Settings button > **Edit Workflows** to view / create new Workflows on Assets
5	Click Settings button > **Edit Picklist values** to modify picklist values through Picklist Editor
6	Search desired records

List of operations you can perform on records in detail view of Asset record

Click **Edit** button to modify existing content.

Click **More** > **Delete** to delete the existing Asset record.

Click **More** > **Duplicate** to clone the existing Asset record.

18. Service Contracts

What is a Service Contract?

Service Contract is a negotiated agreement for the products rendered to your customers. As per the agreed contracts, your support center is supposed to offer service for the product for agreed period of time. It boosts level of customer satisfaction and builds healthy trading relationships.

Create Service Contracts Manually

You can enter Service Contract details manually from Service Contracts Module. This might come handy if you will have to enter Service Contract details individually.
Steps to create Service Contract records manually

1. In Service Contracts tab, click on **Service Contract** button
2. In the Create Service Contract view, fill in the Contract details
3. Click **Save**

Quick Create

You can enter basic details of Service Contract record through Quick create. This might be helpful if you are running out of time.
Steps to create Service Contract records through Quick create

1. Click (+) Icon on top right corner
2. Click **Service Contract**
3. In the Create Service Contract view, fill in the Contract details
4. Click **Save**

Fields Information

Information of fields in the Service Contract create view.

Organizations/ Contacts	This field will be automatically updated with the Organization or Contact related to Services module if Service Contract will be added from Invoces, Sales Orders, POs, and Quotes
Start Date	Provide service start date
Due Date	Provide service expected end date
Tracking Unit	Select the desired tracking unit from the picklist accordingly. When a theTrouble Ticket related to a Service Contract is closed, lookup is done in Hours and Days fields of the Trouble Tickets record and **Used Units** field in Service Contracts will be updated accordingly
Total Units	Specify number of service instances you would offer

Information about fields in the Service Contract detail view

Used Units	Automatically updated when **Status** field of Trouble Ticket associated with Service Contract is set to **Closed**
End Date	Automatically updated when **Status** is set to **Complete**, or **Used Units** reaches, or exceeds **Total Units**
Planned Duration	Automatically updates when Service Contract will come to an end. Calculated as ***Due date - Start Date***
Actual Duration	Time taken, in days, to complete the Service Contract. Calculated as ***End date - Start Date***
Progress(%)	Automatically updated when the **Used Units** field is updated. Calculated as ***Used Units/Total Units * 100***

Note!
1. A few fields are not listed in create view of the Service Contracts record. Values for these fields are auto-
computed in detail view based on the values of other fields.

Associate Service Contracts with Other Records

This will display all-round view of relations of Service Contracts module with other modules and maintains a log of complete history.
You can keep track of following details in the Service Contracts Module

Service Requests	To associate existing Trouble Ticket records
Documents	To associate existing documents with Service Contract record

Note!
1. If the **Related to** field in the Trouble Ticket record is empty, the Contact / Organization information from the Service Contracts module will be populated after associating a Trouble Ticket record with the Service Contract record.

Calculation of Service Instances

Used Units field in the Service Contracts module defines the number of Service Instances resolved by your Support center. The field value is computed based upon **Status** field of the Trouble Tickets module, and **Tracking Unit** field for the Service Contracts module.

Tracking Unit Ticket Status Used Units.

19. Vendors

What is a vendor?

Vendor is a person or organization that supplies Products or Services to your company. Vendor can also be a manufacturer or a re-seller.

Creating vendors individually
You can easily create a vendor record by entering information in the fields provided.

Follow few simple steps to create a vendor record

1. Click **All** drop-down
2. Click **Vendors**
3. In the list view of Invoices module, click **Add Vendor**
4. Provide necessary information the fields, and click **Save**

Quick Create
You can enter basic details of Vendor record through Quick create. This might be helpful if you are running out of time.

Follow few simple steps to create Vendor records through Quick Create

1. Click (+) Icon on top right corner
2. Click **Vendor**
3. In the Create Vendor view, fill in the vendor details
4. Click **Save**

Import existing data

If you have your data in .csv or .vcf format, you can import thousands of records instantly and effectively. *Prism SalesPRO CRM* supports importing data into different modules including Leads, Contacts, Organizations, Opportunities, etc.

Check List

1.Mandatory Fields
Make sure your file addresses all mandatory fields. For instance, **Last Name** and **Company** fields are mandatory in Leads module.You cannot proceed with importing until or unless you have a value within these fields of your .csv file. If the value of mandatory fields is empty, they will be set to '????'.

2. File Size
Make sure the file to be imported do not exceed 5 MB size

3. Permissions
Admin users can disable import access to non-admin users from Profile level. If you can't find the Import option, you should contact your Administrator to enable import permission for your profile

Getting Started

This tutorial will walk you through different steps involved in importing records into your *Prism SalesPRO* CRM account.
The entire process is simple and straightforward.

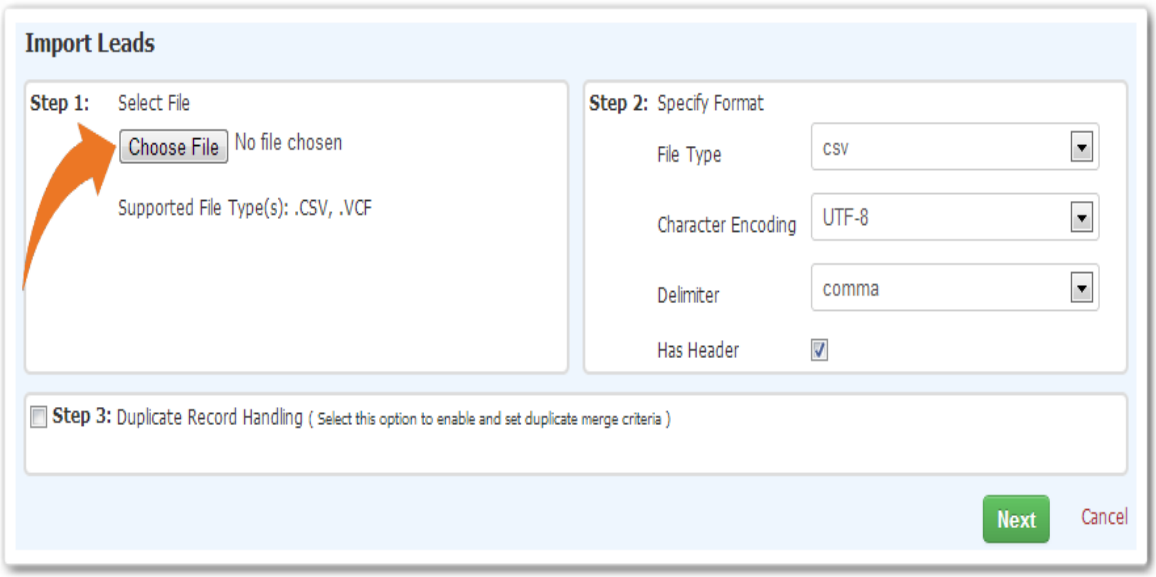
Follow few simple steps to import data into *Prism SalesPRO CRM*

1. Click [Module] tab. Eg: Leads, Contacts, etc
2. Click **Actions** > **Import**

Step 1: Select File

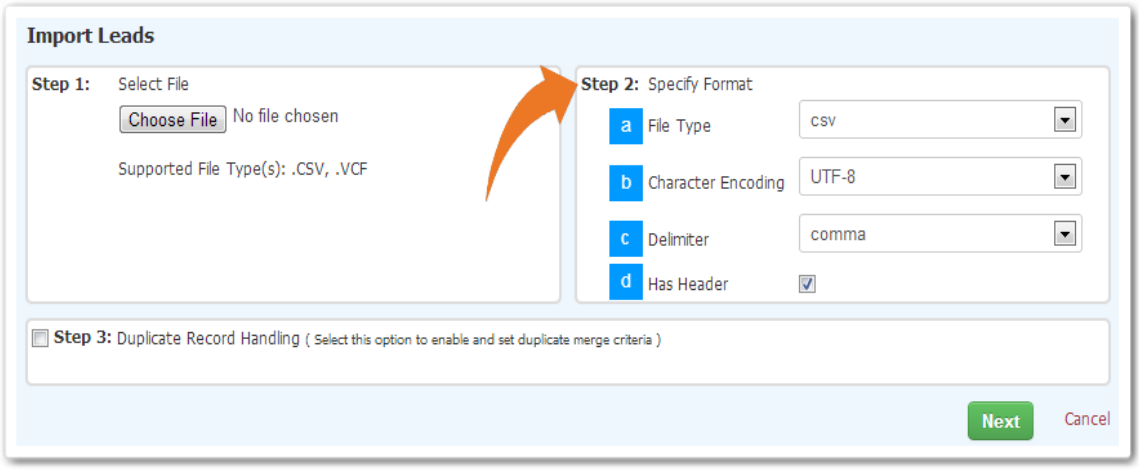
In the first step of importing process, you'll need to browse and upload your import file from your machine.

Here's how to select your.csv file
Click on the **Choose File** button, browse for desired file that is to be imported. Csv and vcf are the two file formats currently supported.



Step 2: Specify Format

In the second step of importing process, you'll need to specify import file properties. The details of each property are explained below.



a. File Type: *Prism SalesPRO*supports two different file types namely: .csv and .vcf. Select the appropriate value from the **File Type** dropdown that describes the format of the file y ou've selected in Step:1. For instance, if you've uploaded .csv file, select .csv from **File Type** field.

b. Character Encoding: Make sure you select the right character set in which your import file has been encoded.
You'll need to select right encoding of the file irrespective of the file contents.

c. Delimiter: *Prism SalesPRO CRM* supports comma (,) and semicolon(;) as field delimiters.
The fields in your .csv file are recognized only if they are separated with delimiters. More often, in a csv file, fields are separated with commas(,).

d. Header: While importing, the header of your .csv file is compared with fields in *Prism SalesPRO CRM*. Having a header makes it easy for you to map fields. Click on **Has Header**checkbox if your file has a header. First row of your csv file is considered as a header.
Please make sure that you uncheck the **Has Header** field if your file doesn't have a header.

File with header

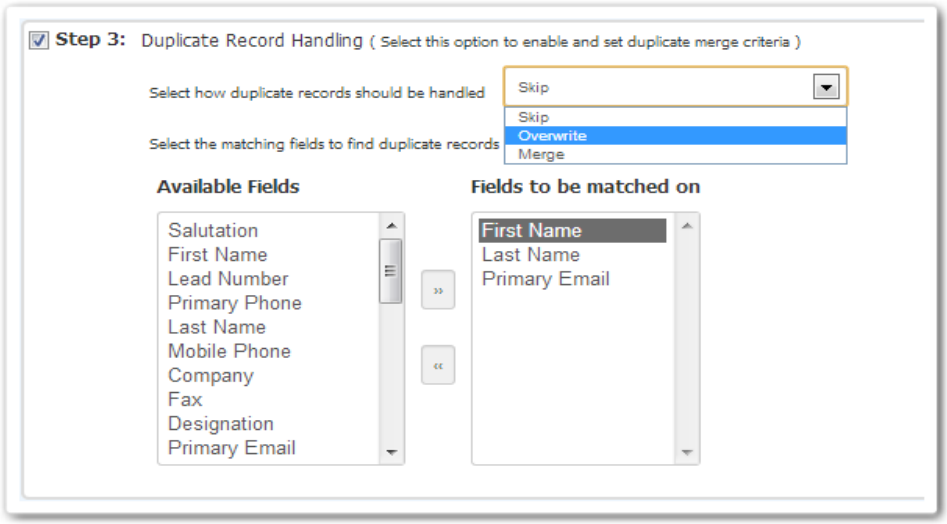
B	C	D
First Name	Last Name	Organization Name
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

File with no header

B	C	D
David	Hocking	Google
Rehman Shareef	Shaik	Blackberry
Srihari	Shiv Raj	Optimus
Yusuf	Khan	Infoysis
Sivani	Goel	HTC
Aaliyah	Singh	Dell

Step 3: Duplicate Record Handling

This is an optional step and comes into play if you would enable the checkbox in Step-3 of the import process. This option will help you in tracing out duplicate records. You can also configure the actions to be performed on duplicate records: skip, overwrite and merge. And finally, select desired fields for duplicate lookup by moving fields from the list of **Available Fields** to **Fields to be matched on** by using the right and left arrows.



Following actions can be performed on duplicate records

Skip: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, duplicate records in .csv file are not imported into *Prism SalesPRO CRM*.

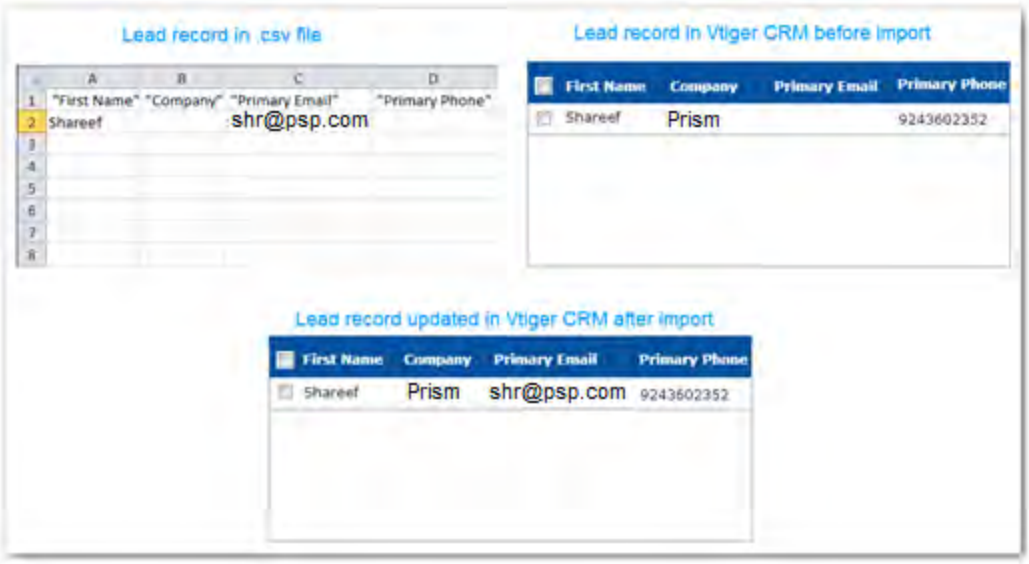
Overwrite: After import, duplicate records are identified based on fields criteria. If your *Prism SalesPRO CRM* and .csv file have records in common, to avoid redundant data, the records in .csv file are imported and replaced with records in *Prism SalesPRO CRM*.

Merge: After import, duplicate records are identified based on fields criteria. Merge, unlike overwrite and skip, checks for duplicate records first and then captures only useful information from your .csv file and updates it in your *Prism SalesPRO CRM*.

Duplicate Merge Importing

Sometimes finding and eliminating duplicates is not your agenda. Skip and overwrite options do not simply meet your requirements because their operation is based on records as whole. What if your records on either ends(csv file and PrismSalesPro) have duplicates but also have important information on those duplicates? That's exactly when merge comes really helpful. Merge feature finds out duplicates and converge information in .csv file and *Prism SalesPRO CRM*; that makes it only one record with complete information.

Let's look at an example:

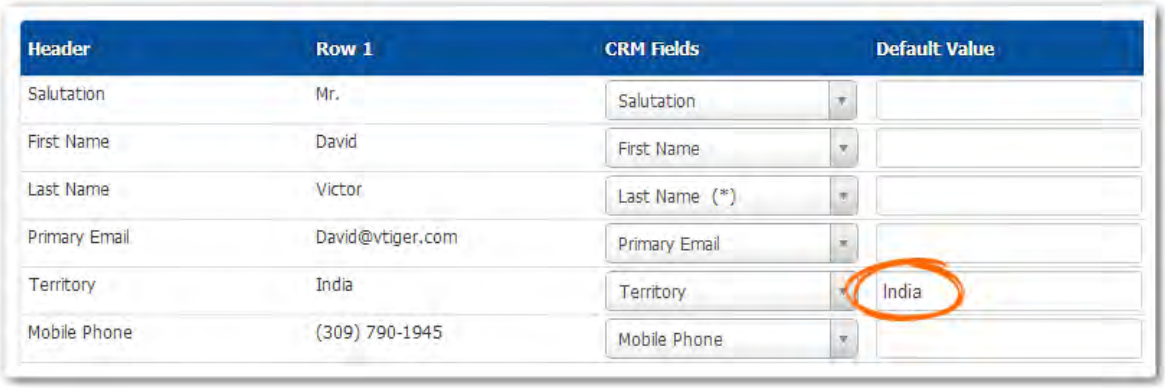

Lead record in .csv file
"First Name" "Company" "Primary Email" "Primary Phone"
Shareef shr@psp.com
Lead record in Vtiger CRM before import
First Name Company Primary Email Primary Phone
Shareef Prism 9243602352
Lead record updated in Vtiger CRM after import
First Name Company Primary Email Primary Phone
Shareef Prism shr@psp.com 9243602352

Lookup is done to check whether records have same field information. If field values are all same, records in csv file are not imported into *Prism SalesPRO CRM*. Besides that, interestingly, if same field on csv file and *Prism SalesPRO*has different values, csv file wins. That means the information on csv file will be updated in *Prism SalesPRO CRM*. Also, if *Prism SalesPRO*has a field with null(empty) value, the field value from csv file will be updated in *Prism SalesPRO CRM*.

Step 4: Map CRM Fields

In the final step of import process, you will need to map import file Header/Column to fields in *Prism SalesPRO CRM*. Fields will be automatically mapped if your csv file's header matches with *Prism SalesPRO CRM* field label.

You can provide default values for mapping fields which will be picked up in case if the value for any field in file will be empty.



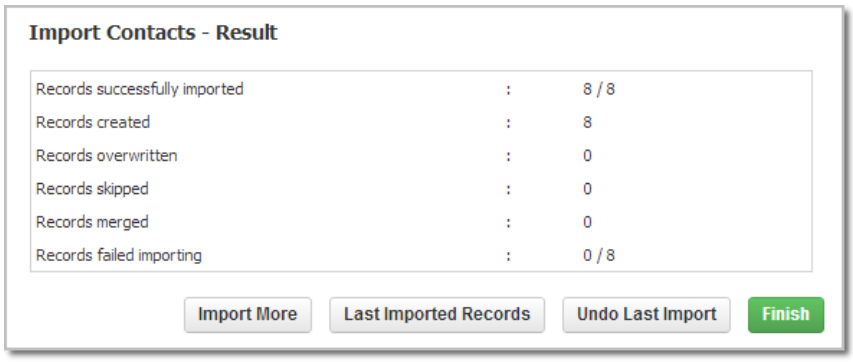
Also, frequently used mappings can be saved and reused.

Saved mappings will be accessible across all users. You can delete the saved mappings by clicking on Trash icon.

After successfully mapping fields, click **Import** button.

Import Results

After successfully importing records into *Prism SalesPRO CRM*, the import results are displayed in tabular format



- **Import More**

  Lets you start all new import again

  - **Last Imported Records**

    Displays records imported lately with the help of paging support.

    - **Undo Last Import**

    Deletes all records that are created during the last import session. Reference records related to other modules will not be deleted.

Notifications!

Import Scheduled!
If you have more than 1000 records in your file, your import will be scheduled on cron which is configured to run once in every 15 minutes. If you have configured your Outgoing Server and Email id properly, an email notification will be sent to you after successful import

Data Corruption Error

This error shows up when the import is interrupted for various reasons like crashing in between, or canceled by a user etc. This error indicates that the import table still has records to be imported into the system, but all the information related to the import (like mapping, default values, merge criteria) are all lost. So these records can no more be imported and the user needs to clear this data before starting any other import.

Import Locked Error

This error will be displayed if the import has been already been started on the same module by any other user in *Prism SalesPRO CRM*. The details of the module, the user, and the time at which the Import has been locked is detailed within the error message itself.
Import Interrupted Error

If an Admin user is performing import and if a non-admin user tries to start an import on the same module, he will get to see the Import Locked error. If non-admin user is doing import, and Admin user attempts to import on the same module, same time, he can be able to see the status of the current import and he will

even have powers to cancel the current import; Consequently, the Import Interrupted Error will be displayed to non-admin user.

Heads Up!

If you would start importing in one particular module, you cannot import records into the same or any other module in *Prism SalesPRO CRM*.

If you would trigger import on a particular module, neither you nor any other user in *Prism SalesPRO CRM* can import records into the same module. However, other users can import records into other modules in *Prism SalesPRO CRM*.

Exporting Vendors to External Source

If you ever want your data in the form of a spreadsheet, you can export your vendor records right away.

Follow few simple steps to export your data

1. Click **Vendors** tab
2. Click **More** button > **Export**
3. In the Export Records page, you will find the following options

Export selected records
Click on the radio button to export the records selected in list view

Export data in current page
Click on the radio button to export all the records that are on the current list view page

Export all data
Click on the radio button to export all records in Vendors module

4. Click **Export Vendors** button.

Operations you can perform in list view of Vendors module

List view of Vendors module enables you to perform mass actions like editing, deleting, importing and filtering records in bulk. In addition, you can also edit fields, workflows and picklist values

Follow few simple steps to manage operations in list view of Vendors module

1. Click **All** drop-down
2. Click **Vendors**
3. Click on checkboxes of desired vendor records beforehand performing edit and delete operations
4. Click **Actions** > **Edit** to modify vendor record(s) in bulk
5. Click **Actions** > **Delete** to delete vendor record(s) in bulk
6. Click **Actions** > **Send Email** to send emails to selected records

7. Click **All Vendors** dropdown > **Create New Filter** to create a new view and sort desired records in one bucket
8. Click wrench icon > **Edit Fields** to configure fields through Layout Editor
9. Click wrench icon > **Edit Workflows** to set up workflows through Workflows
10. Click wrench icon > **Edit Picklist Fields** to configure picklist fields through Picklist Editor

Operations you can perform in detail view of Vendor record

Detail view of vendor record enables you to perform actions like editing, deleting, cloning, exporting the existing record in PDF format, etc

Follow few simple steps to manage operations in detail view of vendor record

1. Click **All** drop-down
2. Click **Vendors**
3. Click on desired vendor record
4. Click **Edit** to modify field information
5. Click **Send Email** to send email to your vendor
6. Click **More** > **Delete** to delete vendor record
7. Click **More** > **Duplicate** to clone current vendor record
8. Click **More** > **Create Purchase Order** to create a new purchase order record by having vendor details automatically populated in it.

Associating Vendors with Other Records

This will display all-round view of relations of Vendors module with other modules and maintains log of complete history.

You can keep track of following details in Vendors module.

Products	To view the Products associated with Vendor record
Purchase Order	To view the Purchase Orders associated with Vendor record
Contacts	To view the Contacts associated with Vendor record
Contacts	To view the emails sent to Vendor record

20. Calendar

A typical day of a sales person includes managing, tracking and following up activities that are scheduled to be done on present day. You can do all that with one single Calendar application in *Prism SalesPRO CRM*.

What do I see in Calendar Module?

You can see a list of activities that are scheduled by you, and shared with you.

1. Events
2. To Dos
3. Opportunities (Expected close date)
4. Support End Date (Contact's support end date)
5. Date of Birth (Contact's date of birth)
6. Invoice (Invoice due date)

What are default views in Calendar Module?

You can see activities in three different views.

1. Month (Activities scheduled on current month)
2. Week (Activities scheduled on current week)
3. Day (Activities scheduled on current day)

How do I create new Activities?

In addition to the auto-populated activities, you can also create new activities in *Prism SalesPRO CRM*

1. Click **Calendar** tab
2. Click **Add Event / Task** button
3. Select **Event** or **Task** and fill the details
4. Click **Save**

Note!
1.To create activities instantly, click on desired Calendar date, fill up details in pop up and click **Save**
2.You can also create events and to dos by clicking on **Activities** in detail view of [Module] record. Eg. Contacts

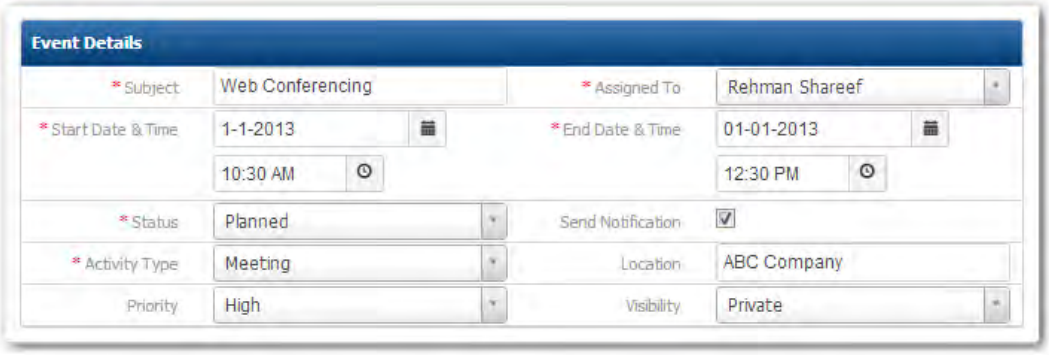
Working with Calendar module

It's easy to schedule, invite, share, and Organize your events with the help of Calendar module in *Prism SalesPRO CRM*.
Hi, I am Shareef. I am a sales rep in ABC company. I undertake web conferencing with our customers on 1st day of every month.
To schedule an event, I will

1.Click on **Calendar** tab

2.Click **Add Event / Task button** on top right

3.Enter Subject, Start Date and Time, End Date and Time, Status and other details.

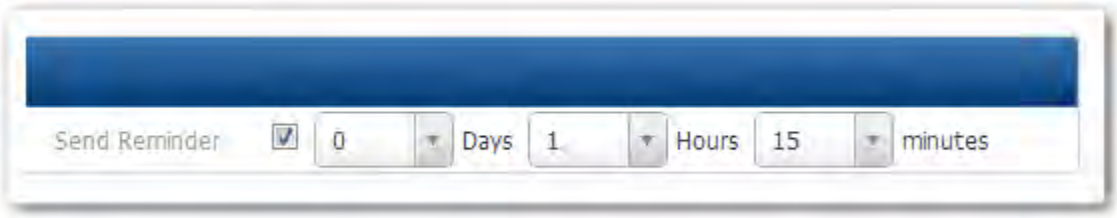


Reminder

I deal with thousands of business operations every day. I will set up a **Reminder** so that I will not get lost in too many activities.
To set up a Reminder, I will

1. Click on check-box next to **Send Reminder** in 'Reminder Details' block
2. I want the system to remind me 1 hour and 15 minutes before commencement of the event.

I will select **0 Days 1 Hour 15 Minutes**



This will send me an email reminder one hour 15 minutes before the commencement of the event

Repeat

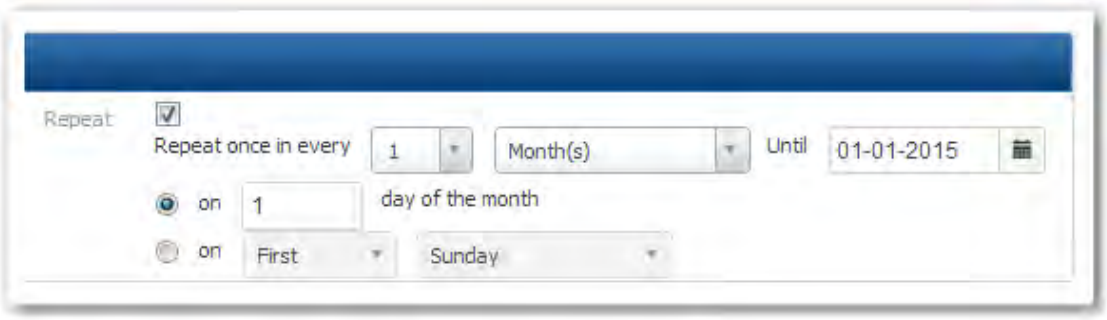
I plan to organize web conferencing every month until a period of time in future. So, I would like to enable **Repeat**.
To enable Repeat, I will

1. Click on check-box next to **Repeat** in 'Recurrence Details' block
2. I undertake web conferencing once in every month until 2015

I will select **Repeat once in every 1 Month Until 01-01-2015**

3. I will continue providing the web conference on day basis ie., on 1st day of every month

I will select the radio button, and enter **on 1 day of every month**



Relate

I am addressing a targeted list of Contacts as a part of Web conferencing. I will populate those contacts into my event so that I can view complete list of activities scheduled on them at later stages.
To relate the event with other Contacts, I will

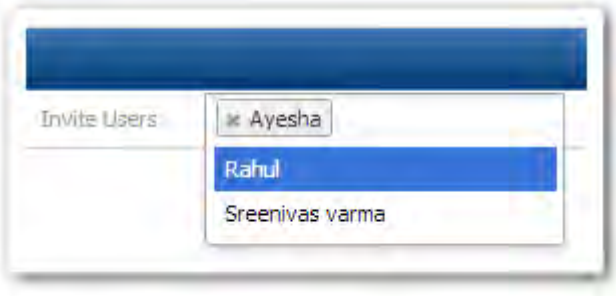
1. Click search icon within Contact Name field
2. Choose from existing Contact records and click **Select**

Notes!
1.You can also relate events to Leads, Organizations, Opportunities, Tickets and Campaigns but only one record at a time.
2.You can relate multiple Contacts at one shot

Invite

I also want one of my team mates to be a part of web conference. I will send invite and automatically an email notification will be sent to her.
To invite users, I will

1. Click on text space provided next to **Invite Users** field within 'Invite' block
2. Select from list of available users



Note! You can only send invitations to existing users in your *Prism SalesPRO CRM*

I will click **Save**. I am done. This is so simple!

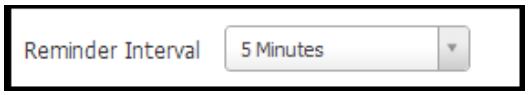
Calendar Settings

I wish I could configure my Calendar like the way I wanted it to be. I follow few simple steps to set up Calendar to match my preferences.

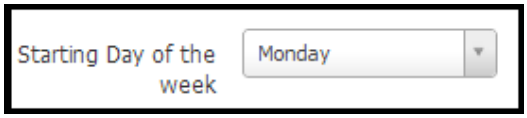
To configure Calendar settings, I will

1. Click on Calendar Settings icon on top right of Calendar home page

Once an event reminder popup shows up on my screen, I want it to display again only within 5 minutes after I close it.



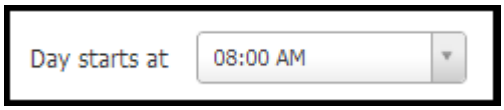
I get back to work on Mondays after drowsy weekends. I want my calendar to begin from Mondays, too.



My job is to follow up events that are scheduled to be done on present day. I will make **Today** as my Default Activity view.

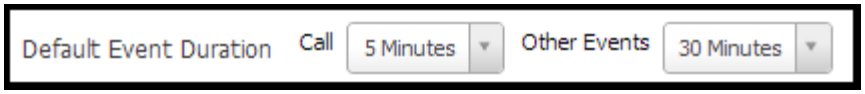
I will select traditional date format that is widely accepted in my Country.

I am supposed to be at my office by 8 AM. So, my day starts at 8 AM.



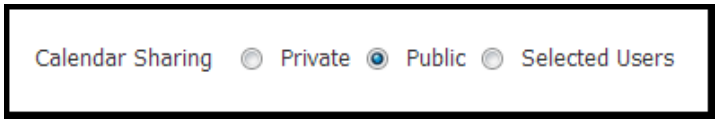
Our company is located in India. So, I will select Indian time zone here.

Events like Meetings, Web Conferences etc consume much time, say 30 minutes. I will end up Calls within 5 minutes. I can configure default event duration in Settings, so that I'll need not have to set up **End Date and Time** while creating events.



I can share my calendar with all other users in our company, share with only selected users, or completely hide all events from viewing by other users.
Different options that are available to share my calender

1. **Private**: No one can view my events
2. **Public**: Every one can view my events.
3. **Selected Users**: Only selected users can view my calendar



Here's my shared calendar page. The events shared by all other users in my *Prism SalesPRO CRM* account are displayed in here. We stay connected on one single page.

Notes! When I share my calendar with **Public** or **Selected Users**, the events with **Visibility** set as **Private** will be displayed as **Busy*** for shared users
1.Events shared with you can be viewed in **Shared Calendar** tab.
2.Events that are created by you or assigned to you can be viewed in **My Calendar** tab.
3.Events that belong to you, and events belong to users in your lower hierarchy can be viewed in **List View** tab.

Attention!
For instance, consider that A and B are two users in upper and lower hierarchy respectively. If A and B shared calendars mutually, B can view A's event but cannot make any modifications on event record. Not only does A view B's shared event, but he can also make modifications on it.

2. I click **Save**.

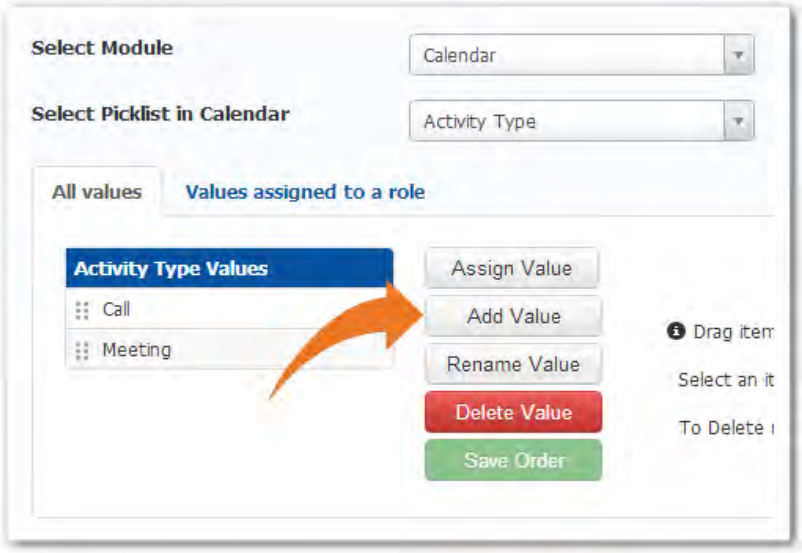
Note! You can also configure Calendar Settings from My Preferences page.

Creating Custom Event Type

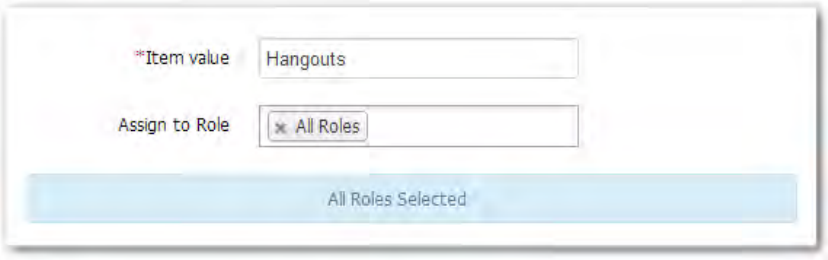
Event types such as Call and Meeting are provided by default along with *Prism SalesPRO CRM* package. You can create custom event types to schedule events that meet your organization's or personal requirements. For instance, Meetups, Hangouts, etc

Follow few simple steps to create custom event types

1. Click gear icon in the top right
2. Click **CRM Settings**
3. Click 'Studio' drop-down in the left
4. Click **Picklist Editor**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Select **Calendar** from **Select Module** dropdown
6. Select **Activity Type** from **Select Picklist in Calendar** dropdown
7. Available values in Activity Type field are displayed under **All Values** tab
8. Click **Add Value** button on the right to add a custom event type



9. Provide a label to your custom event, select desired roles and click **Save**



10.After save, your custom event type will be available for selection in **Activity Type** field in create or edit view of events.

21. Documents

What is a Document?

Documents are the files you save in *Prism SalesPRO CRM*. You can either upload files directly or provide an external link to download the file again. Files can be classified by grouping them under different folders.

Manage Documents

You can perform different operations on records in list view of Documents

1. Create Custom filters to classify records as per your requirements.

2. Click on **Actions** drop-down to perform following operations

Select **Delete** to delete selected records
Select **Move** to shuffle records across folders

Select **Export** to transfer records to spreadsheets

3. Click Settings button to perform following operations

Select **Edit Fields** to customize layout of fields through Layout Editor
Select **Edit Picklist Values** to modify picklist values through Piicklist Editor

Working with Documents

Documents module is more like a drive. You might sometimes need to save your work related files, personal files, Images etc.

You can upload all such files in Documents.

Note! The maximum file upload limit is 5 Mb.

Creating Folders

Documents module gives you the flexibility to create folders and save documents in selected folder.

To create a custom folder,

1. Click **Documents** tab
2. Click **Add Document** button
3. Enter folder name and description
4. Click **Save**

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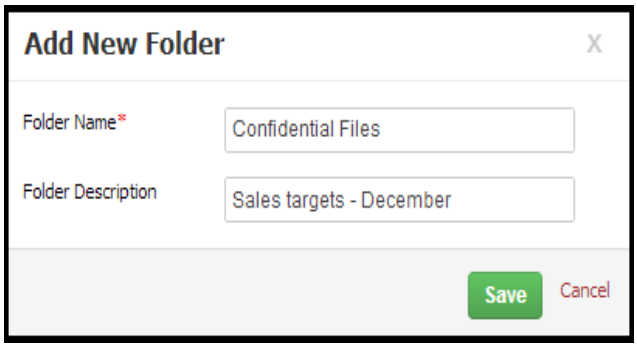


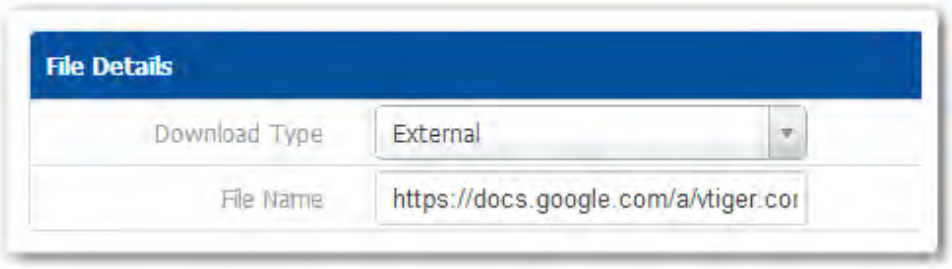
Note! Folders will be displayed to all users in your *Prism SalesPRO CRM*. If you do not want files to be displayed to other users, enable permissions(Eg: Private) from **Sharing Access**.

Creating Documents

This feature enables you to create documents and share them with other users in your *Prism SalesPRO CRM* account.

To create a new document,

1. Click **Add Document** button
2. Enter title, select folder and assign to Sales team
3. Select Download Type as **Internal** if you wish to attach a downloadable document from your system
4. Select Download Type as **External** to provide an URL of your external file location from where the file can be downloaded
5. Click **Choose File** in File Name field and upload files from your drive
6. Click **Save**



Note! *Prism SalesPRO*supports two types of documents.
1. Internal: Upload a file from the drive and download or send email as attachment when required.
2. External: Provide an URL of external file location from where the file can be downloaded.

Download Document

Now that the file is assigned to the Sales team, her team members can download the file by clicking on **File Name** field. Download Count field in detail view of document displays the number of times the file has been downloaded

22. Recycle Bin

What is a Recycle Bin?

Records that are deleted from different modules are stored in Recycle Bin. It acts like an archive for all deleted records and helps you restore them when required.

Working with Recycle Bin

Sometimes, accidentally, we delete records that hold a lots of importance. Such mistakes can cost us a lot. Recycle Bin in *Prism SalesPRO CRM* will help you to restore deleted records back in actual position. For instance, if you delete records in Leads module,

1. Click **Recycle** Bin tab
2. Select **Leads** from **Select Module** drop-down
3. Select desired record(s) by clicking on check-boxes
4. Click **Restore** button

Note!
1.Only administrators will have access to **Empty Recycle Bin** button
2. Empty Recycle Bin option will permanently remove all the deleted records from the database

Attention!
1**.** If you delete an Organization record, or a Contact record, Opportunity record associated with it will also be deleted. If you would restore both the records back from Recycle bin, you can have the relation between two records back.
2. If you delete an Organization record, Contact records associated with the Organization will not be deleted. But it will break the relation between them.
3. If you delete a Contact record associated with any Organization, it will only delete the Contact record. Organization will remain the same. You can see the relation back if you would restore the Contact record from Recycle bin.

1. Users

Who are users?

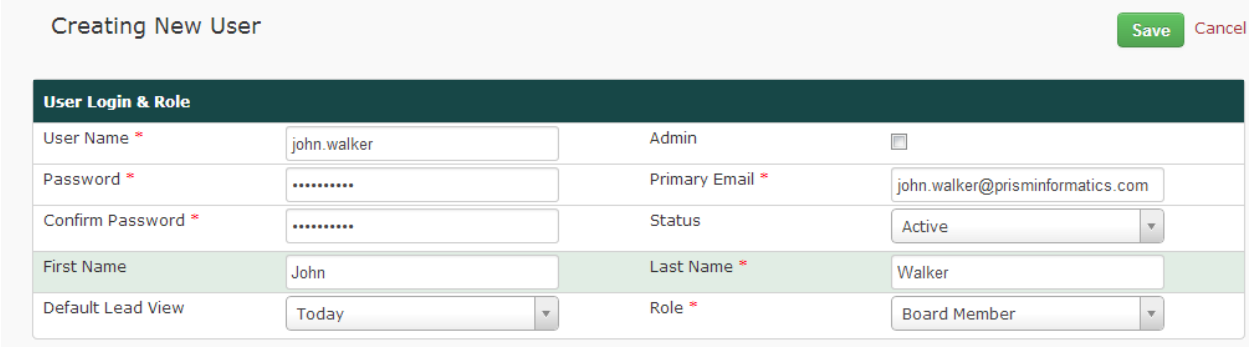
Users are employees in your organization who can log into their *Prism SalesPRO CRM* accounts, access information, and perform tasks according to permissions that have been defined to them. In PrismSalesPRO, admin users have the ability to create user accounts. *Prism SalesPRO CRM* supports two types of users: admin users and standard users.

Adding New Users

Users with admin rights have the ability to add new users. The process of adding new users has been revamped.

Here's how to **add new users** in *Prism SalesPRO CRM*

1. Click gear icon in the upper right.
2. Click **Manage Users**
3. Click **Add User**.



4. In the **User Name** field, provide desired user name.
5. Enable the **Admin** check-box to grant admin privileges.
6. In the **Password** field provide appropriate password which will be emailed to that user. After logging in, users can change their corresponding passwords.
7. In the **Confirm Password** field, re-enter the password you've provided earlier.
8. In the **Primary Email** field provide user's unique email address that hasn't been used before. After the account creation, an email will be sent on this email address.
9. In the **Status field**, select **Active** to have the users log in and access their accounts; select **Inactive** to restrict users from accessing their *Prism SalesPRO CRM* accounts.
10. In the **First Name** and **Last Name** fields, provide users' first and last names respectively
11. In the **Default Lead View** field
12. In the **Role** field, select appropriate appropriate role of the user in role hierarchy.
13. After filling up the fields, click **Save**

Deleting Users

You can delete user accounts to terminate their access to *Prism SalesPRO CRM*. After delete, users will not be able to log into *Prism SalesPRO CRM* anymore.
Here's how to delete users :

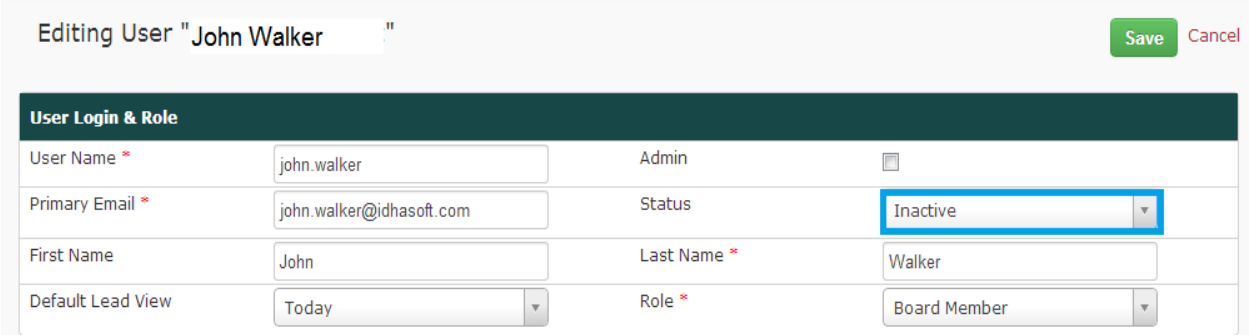
1. Click gear icon in the upper right.

2. Click **Manage Users**

3. In the list view of users, click on icon to delete corresponding user

4. In the detailed view of the user to be deleted, change the Status from **"Active"** to **"Inactive"**

5. Click **Save.**



2. Profiles

What are profiles?

Profiles are used to control actions that users can perform on records. In addition, profiles can be used to restrict access to specific fields, modules, and features such as import, export, etc. When a profile is associated to a role, the access rights defined in the profile will be applied across all users in that role.

Notes! Users in higher hierarchy can always view records of users in lower hierarchy.

Step 1 : Creating Profiles

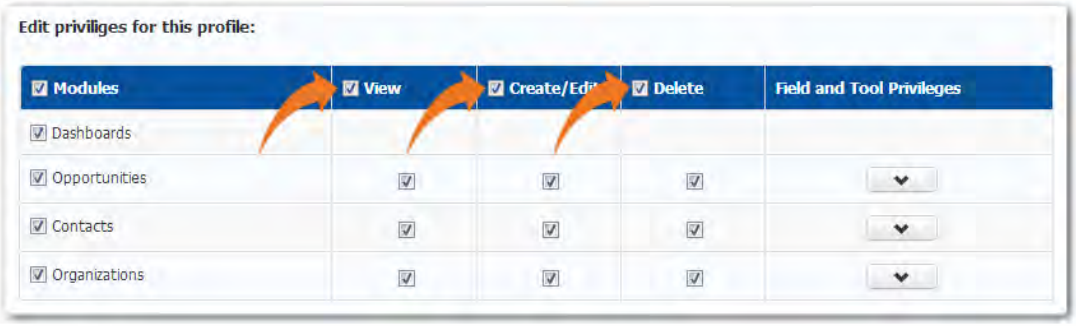
You can create different profiles and associate with roles in *Prism SalesPRO CRM*. For instance, you can create different profiles for your Sales team, Support team, etc
Follow few simple steps to create a profile

1. Click gear icon in the upper right
2. Click **CRM Settings**
3. Click 'User and Access Control' drop-down in the left
4. Click **Profiles**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click **Add Profile**
6. Provide **Profile Name** and **Description**. These fields are only for your reference
7. Define privileges for your profile. (We will discuss this in next step)
8. Click **Save**

Step 2 : Defining Permissions

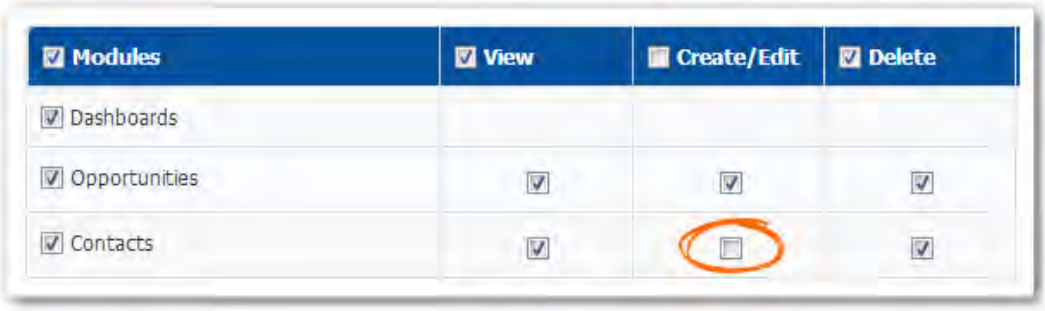
Profiles give you the flexibility to define privileges on your profile. This makes sure that you've total control on operations your users can perform on records. The fine grained access control allows you to enable or disable **Modules**, **Fields**, and tools such as **Import**, **Export**, **Duplicates Handling**, etc. Additionally, you can also promote or revoke access to View, Edit/Create, and Delete operations on fields and modules in *Prism SalesPRO CRM*.

Disable or enable the highlighted checkboxes to revoke or grant access to appropriate operation(View, Create/Edit, Delete) on all available modules in *Prism SalesPRO CRM*. For instance, if you do not want your sales reps to delete records, you can disable **Delete** checkbox. As a result, your sales reps will be able to create/edit and view records but can't delete.



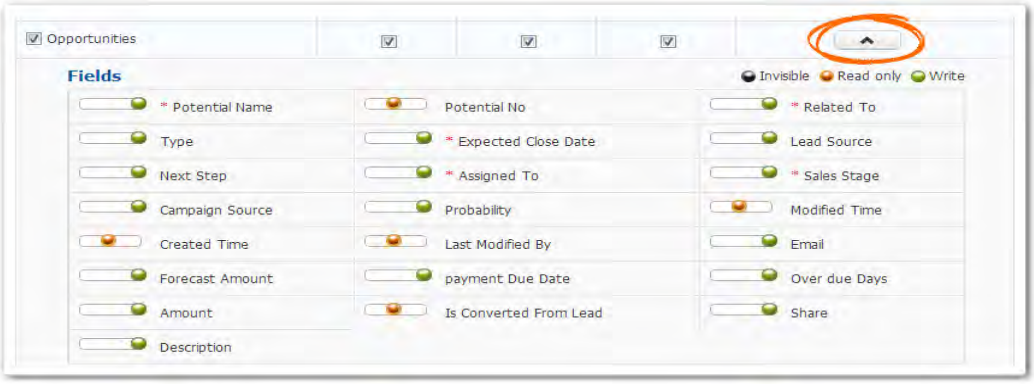
To disable a specific module, you'll need to uncheck the checkbox corresponding to that module.

To disable permissions on a specific module, you'll need to uncheck the checkbox under corresponding tab. For instance, if you don't want your support team to Create/Edit**Contacts**, you'll need to uncheck the checkbox next to **Contacts** and under **Create/Edit** tab



Defining permissions on fields and tools

We've discussed about the permissions that can be defined on modules available in *Prism SalesPRO CRM*. Apart from that, Profiles also enables you to define access permissions on the fields and tools: **Import**, **Export**, **Duplicates Handling**, etc, that available within those modules. To define privileges, you'll need to click on the drop-down under 'Field and Tool Privileges' of your desired module



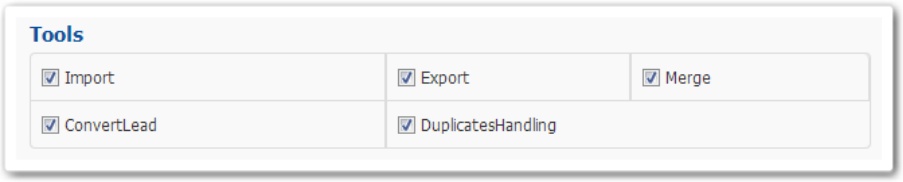
You can move the ball beside the fields to define privileges.

1. Green represents **Write**. That means user can be able to modify the value in the fields
2. Orange represents **Read Only**. That means user can only view but cannot make any modifications on the field value
3. Black represents **Invisible**. That means field is completely hidden and not visible for the users

Profiles also gives you the flexibility to assign privileges on features that are related to the module. For instance, you can restrict your users from importing or exporting records in *Prism SalesPRO CRM*.

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

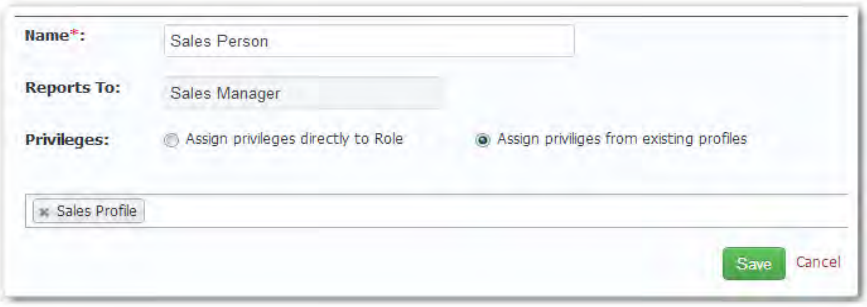
Under the 'Tools' section, click on checkboxes to enable/disable corresponding feature.



Step 3 : Assigning users to a profile

Profile cannot be directly linked with users. You'll need to associate a profile with a role; as a result, privileges are affected to all users across that role.
Here's how to do it

1. Click gear icon in the top right
2. Click **CRM Settings**
3. Click 'User and Access Control' drop-down in the left
4. Click **Roles**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Select desired role and select corresponding profile



Notes!
1. You can associate multiple users and profiles for the same role.
2. When you associate multiple users for same role, the users under the role will not be able to see each others' records.
3. A role always work with respect to Profiles and Sharing Access.

Deleting a Profile

If existing profiles doesn't meet your requirements, you can delete them right away. Before deleting, responsibilities of that profile should be transferred to another existing profile.
Follow few simple steps to delete an existing profile

1. In the list view of Profiles, click trash icon to the right of your desired profile
2. In the popup, transfer responsibilities to another existing profile
3. Click **Save**

3.Roles

What are Roles?

You can mimic your organization-wide hierarchy in *Prism SalesPRO CRM* with the help of Roles. You can assign identical designations to your employees like Sales Manager, Support Engineer, etc. User's position in hierarchy will decide which of the records he/she can access.

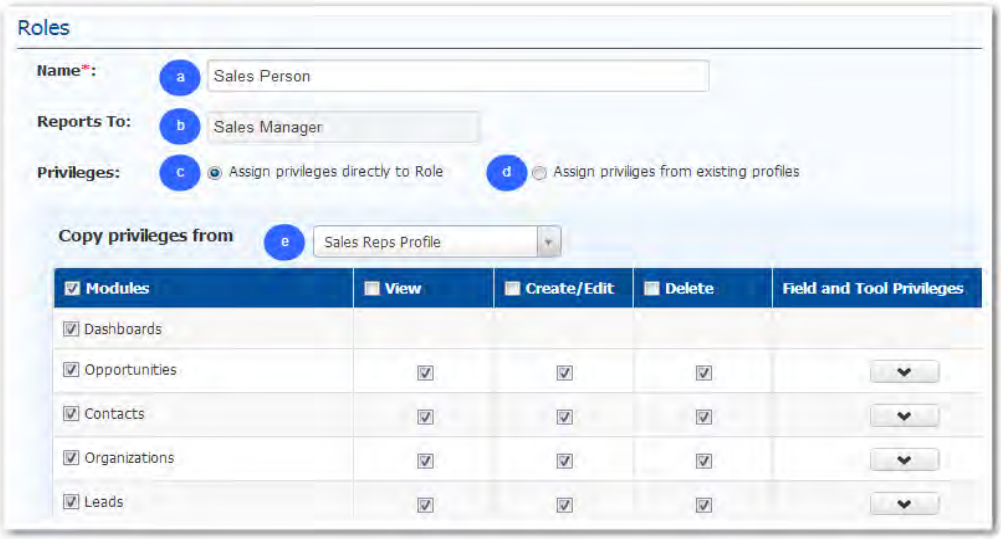
Notes!
1. When Sharing Rules are set to Private, users can always view their own records and their subordinates' records, whereas non-admin users can not view records of their superiors and peers

Creating Roles

This feature enables you to create new roles for your users to mimic your organization-wide hierarchy in *Prism SalesPRO CRM*. Roles like CEO and Sales Manager are provided by default along with *Prism SalesPRO CRM* package. You can now define access privileges while you create a role. The idea is to reduce clicks and navigation. Having privileges defined on a role eliminates the necessity to create a different profile and associate it to a role. Additionally, you need not have to visit individual profiles to view or modify privileges you've defined earlier.

Follow few simple steps to create roles

1. Click gear icon in the upper right
2. Click **CRM Settings**
3. Click 'User and Access Control' drop-down in the left
4. Click **Roles**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Hover mouse over the existing roles and click on (+) icon to create a new role



a	**Name**	Provide desired label for your role
b	**Reports To**	This field is auto-selected. The role superior to current role is displayed here.

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

c	**Assign Privileges directly to a role**	The access privileges can be defined here without having to create a new profile and assign it to your role.
d	**Assign privileges from existing profiles**	Select from existing profiles to imply privileges defined on selected profile
e	**Copy privileges from**	If you've already defined permissions in an existing profile, you can populate them by selecting desired profile from the drop-down

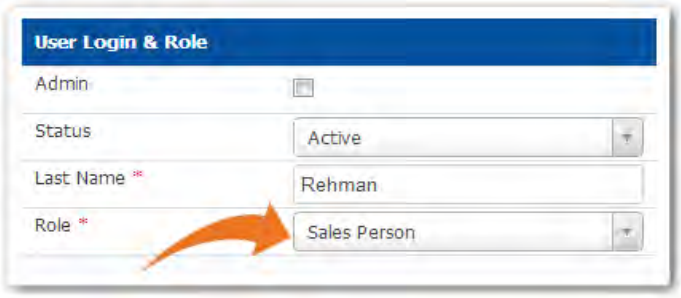
6. Click **Save**

Assigning Roles to users

This feature enables you to associate roles to users to fit them in your role hierarchy. When you create a new user, Sales Manager profile will be designated by default.

Follow few simple steps to assign a role to user

1. Click gear icon in the upper right
2. Click **CRM Settings**
3. Click 'User and Access Control' drop-down in the left
4. Click **Users**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click edit icon to the right of your desired user
6. Locate **Role** field, select desired role for the user



7.Click **Save**

Notes!
1. You can associate multiple users and profiles for the same role.
2. When you associate multiple users for same role, the users under the role will not be able to see each others' records.
3. A role always work with respect to Profiles and Sharing Access.

4. Sharing Rules

What are Sharing Rules?

Sharing Rules are used to configure data sharing rules across users in role hierarchy. In *Prism SalesPRO CRM*, the default access for CRM records is set to public, which enables everyone to see all records. When sharing rules are set to private, users can only view records assigned to them and records of users below them in role hierarchy. Sharing Rules also help you to set custom sharing rules to share data with specific role, role and subordinate, and group.

Notes! Admin users can view all records irrespective of roles, profiles and sharing rules

Features

Sharing Rules enables you to configure following permissions across users in *Prism SalesPRO CRM*.

1	**Private**	Users can only view records assigned to them, and records that are assigned to users with a role below them.
2	**Public Read only**	Everyone can view all records but cannot modify and delete the records.
3	**Public Read, Create/Edit**	Everyone can view and modify all records but cannot delete the records.
4	**Public: Read, Create/Edit, Delete**	Everyone can view, modify and delete every one else's records.

Configuring organization-wide sharing rules

This feature enables you to configure sharing rules across your organization. The default sharing rules offered by *Prism SalesPRO CRM* are set to Public. However, you can change the sharing rules according to your requirements.

Follow few simple steps to configure sharing rules

1. Click gear icon in the upper right
2. Click **CRM Settings**
3. Click 'User and Access Control' drop-down
4. Click **Sharing Rules**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click radio buttons to configure new set of sharing rules
6. Click **Apply New Sharing Rules** to update changes

Notes! Please make sure you click on **Apply New Sharing Rules** button after making modifications. If not, your changes will not be affected.

Setting up custom sharing rules

Custom sharing rules are used to allow subordinates to perform operations on superiors' records. In other words, you, as a user on upper hierarchy, can grant access to your subordinates to view your records.

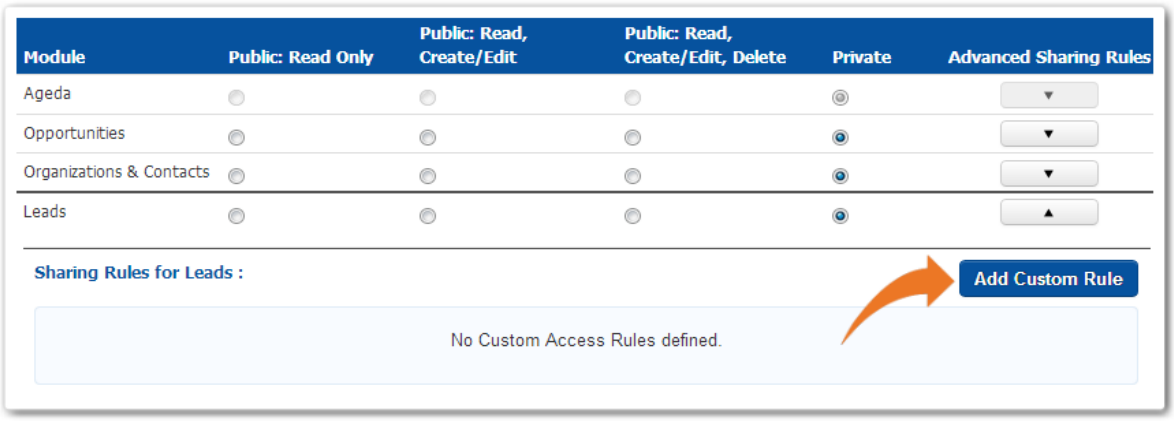
This can also be achieved by setting up Sharing Rules to Public, but the intention here is to only grant access to selected group, role and, role and subordinates that are below you in role hierarchy.

For instance, Sales Manager is on a role hierarchy above Sales Person. As sharing rules are set to private, Sales Manager can view Sales Person's records but not the other way around. Sales Manager wants to give access on his records to his Sales Person. Now setting sharing rules to Public will let everyone view Sales Manager's records. Setting up custom sharing rules gives Sales Manager the flexibility to exclusively grant access to Sales Person role.

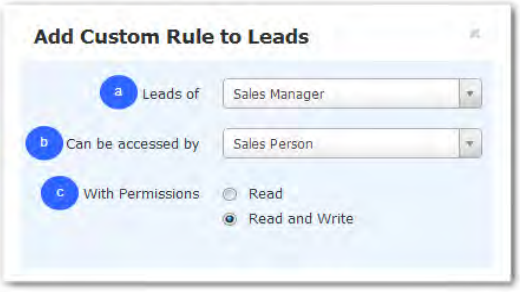
Follow few simple steps to define custom sharing rules

1. In Sharing Rules view, click drop-down under 'Advanced Sharing Rules' tab

2. Click **Add Custom Rule** button



3. In the popup, define custom sharing rules



a. Select a value to specify whose records should be accessed (Superior)
b. Select a value to specify who will be accessing the records of superior (Subordinate)
c. Select privileges that users have on records

4. Click **Save** to update changes

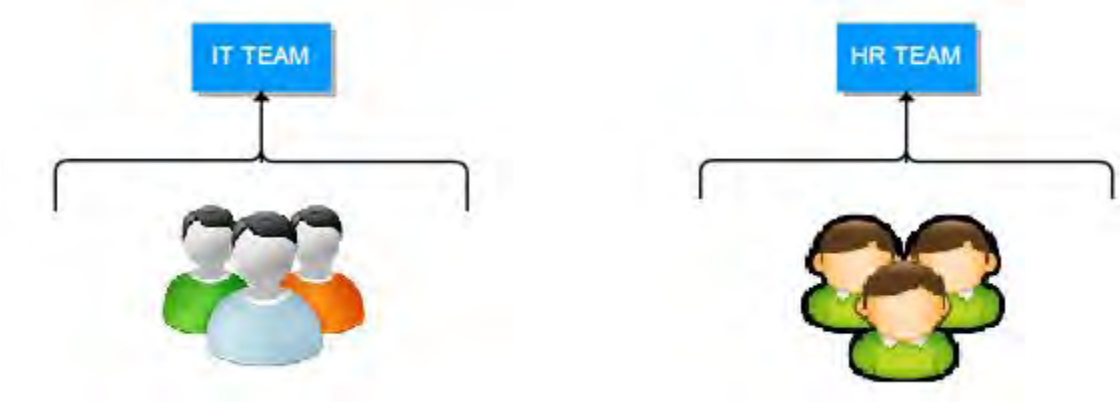
Similarly, you can configure custom sharing rules to share data with role, roles and subordinates and group.

Notes! You will have to define custom sharing rules for every module individually.

5.Groups

What are groups?

Groups can be combination on different users, roles, roles and subordinates and groups within an organization. Groups will help you to build teams to share common set of records.



Key features

When records are assigned to a group, all members associated with the group can perform operations on the record. This will help your users to work together as a team.
For instance, If a support team member is on leave for the day, there is a chance that trouble ticket(case) assigned to him will not be resolved in time. Should the ticket be assigned to a group, all members associated to the group will get email notification and any one can handle the issue.

A group supports following combinations

1. **Users** : Selected users will be part of the group
2. **Roles**: All users associated with a role will be part of the group
3. **Roles and subordinates** : All users associated with the role, and its subordinates will be part of the group
4. **Group**: All users associated with selected group will be part of the group

Notes!
1.Groups will also help you to define custom sharing rules. You can define data sharing rules to make a certain role, role and subordinates, or a group view records of another role, role and subordinates, or a group.

Creating Groups

You can create different groups to manage common set of operations within your organization

Follow few simple steps to create a group

1. Click gear icon in the upper right
2. Click **CRM Settings**
3. Click 'User and Access Control' drop-down in the left

4. Click **Groups**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click **Add Group**
6. Provide label, description, and select appropriate entities as members of the group. Colours are illustrated to differentiate entities.

7. Click **Save** to update changes

Editing Groups

This feature enables you to modify existing groups to meet your requirements.

Few simple steps to edit a group

1. In the list view of groups, click on pencil icon to the right of desired group
2. Modify fields
3. Click **Save** to update changes

Deleting Groups

This feature enables you to delete existing group if it doesn't meet your requirements.

Follow few simple steps to delete an existing group

1. In the list view of groups, click on pencil icon to the right of desired group
2. Transfer responsibilities to another existing group
3. Click **Save**

6. Fields and Layout Editor

What is a field and a layout editor?

Prism SalesPRO CRM offers a set of default fields. **Fields and Layout Editor** feature enables you to create custom fields, rearrange fields, edit field properties, and move fields inside and across blocks. The fields you create are accessed by all users across your *Prism SalesPRO CRM* account, unless you've defined permissions through Profiles.

You can navigate to Edit Fields and Layout Editor in two different ways.

Through settings

1. Click gear icon in the top right corner
2. Click **CRM Settings**
3. Click 'Studio' drop-down in the left
4. Click **Edit Fields**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Select a module from the drop-down in top-right

Through corresponding module

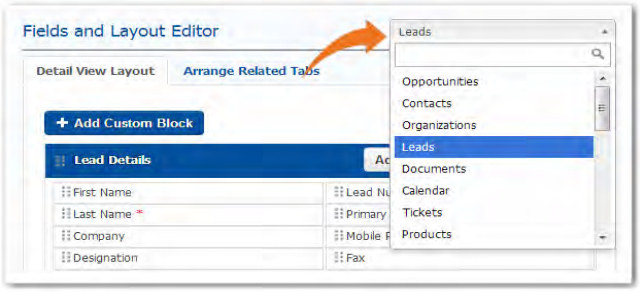
1. Click desired module Eg: Leads
2. Click on desired record in the selected module
3. Click wrench icon in the top right corner
4. Click **Edit Fields**

Getting Started

We've discussed different methods of reaching to **Edit Fields and Layout Editor**. If you reach **Fields and Layout Editor** through Settings page, you'll need to select desired module from the drop-down; As a result, all the fields in that module will be displayed. This will help you to perform different operations on those fields. On the other hand, however, if you'd reach **Edit Fields and Layout Editor** by clicking on **Edit Fields** in a selected module, you can ignore this step.

Follow few simple steps to select a module

1. Click gear icon in the top right corner
2. Click **CRM Settings**
3. Click 'Studio' drop-down in the left
4. Click **Edit Fields**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Select a module from the drop-down in top-right



Adding Custom Fields

This feature enables you to add custom fields in addition to default fields offered by *Prism SalesPRO CRM*.

Follow few simple steps to add custom fields in selected module

1. Click **Add Custom Field** button in the top right

2. Select desired data type from the **Select Field Type** drop-down. Provide field name in **Label Name** field, and specify field length in **Length** field

3. To update changes, click **Save**

Custom Fields Table

Prism SalesPRO CRM offers a wide variety of choices in creating custom fields to accord your business requirements. The following table gives complete information of custom Fields that are supported in *Prism SalesPRO CRM*.

Field Type	Description	Fields Information
Text	To add text	• Label: Provide field name • Length: Provide field size • Maximum Characters: 255
Decimal	To add decimals	• Label: Provide field name • Length: Provide field size • Decimal: Provide number of decimal places • Maximum Characters: 59
Integer	To add integers	• Label: Provide field name • Length: Provide field size • Maximum Characters: 255
Percent	To add percentage	• Label: Provide field name
Currency	To add currency values	• Label: Provide field name • Length: Provide field size • Maximum Characters: 255
Email	To add email address	• Label: Provide field name
Phone	To add Phone number	• Label: Provide field name
Pick List	To add drop-down fields	• Label: Provide field name • Picklist values: Provide picklist values
URL	To add website address	• Label: Provide field name
Check-Box	Enable check-box for true. Disable for false	• Label: Provide field name
Text Area	To add long text	• Label: Provide field name
Multi-Select Combo Box	Add picklist field to select multiple values	• Label: Provide field name • Picklist Values: Provide picklist values

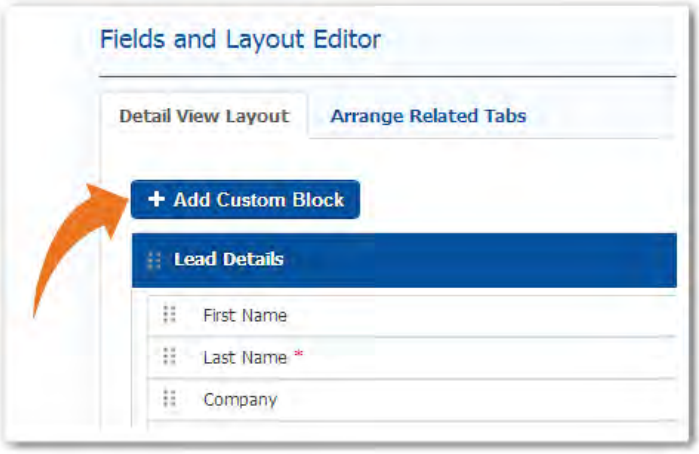
Skype	To add skype id	• Label: Provide field name
Time	To add time	• Label: Provide field name

Creating Custom Block

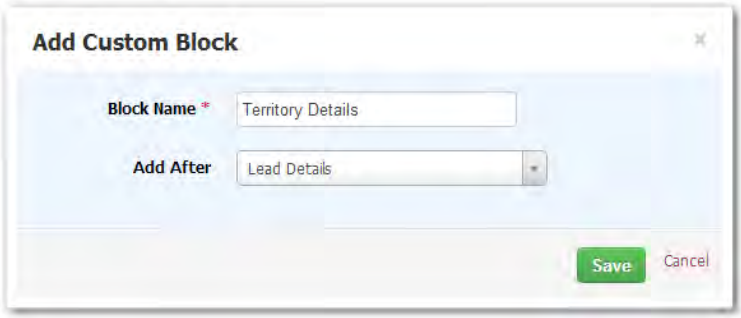
This feature enables you to create new blocks in addition to default blocks offered by *Prism SalesPRO CRM*. You can also

Follow few simple steps to create a new custom block

1. Click **Add Custom Block**



2. It brings up a pop-up. Provide label in **Block Name** and select a block from **Add After** drop-down to place your next to selected block.



3. Click **Save** to update changes

Rearranging Fields

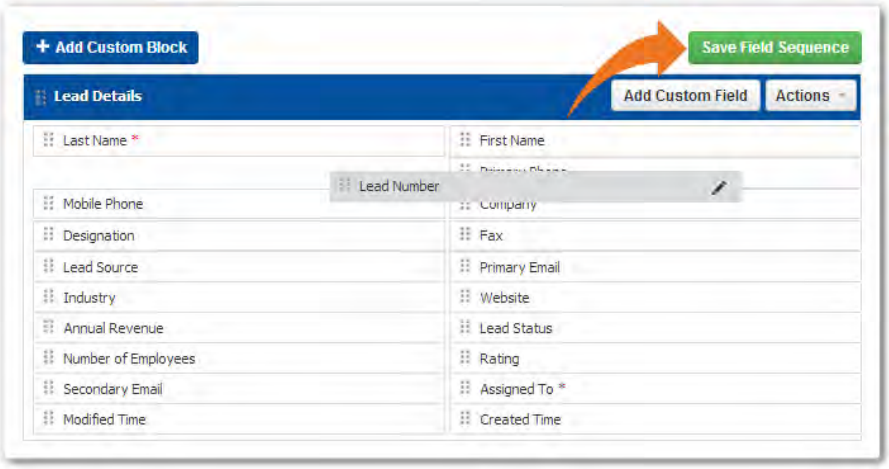
Prism SalesPRO CRM gives you the flexibility to rearrange the arrangement of the fields according to your business requirements. Click on desired field and drag it on to any selected location in and across blocks.

Follow few simple steps to reorganize fields

1.In **Fields and Layout Editor** of selected module, click on desired field

2.Drag the field to desired location.(You can move fields in all possible directions: left, right, up, and down)

3.After rearranging fields, click **Save Field Sequence** button in the top-right



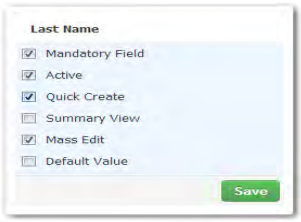
Editing Field Properties

This feature helps you to configure basic preferences of fields in *Prism SalesPRO CRM*. You can also enable/disable fields across Modules, Quick Create, Summary View and Mass Edit.

Follow few simple steps to edit field properties

1.Click pencil icon next to your desired field

2. It brings up a pop-up that has set of options that can be configured on selected module



Field Property	Functionality
Mandatory field	To make the field mandatory for the Users to fill in
Active	To enable or hide the field for all users
Quick Create	To make the field available in Quick Create popup
Summary View	To display the field in summary view of the record
Mass Edit	To make the field available during mass edit
Default Value	To set default value for the field

3. After modifying field properties, click **Save**

Note! Some Checkboxes are disabled in some fields because their properties cannot be edited (which otherwise can lead to inconsistency in the CRM)

Deleting Fields

If custom fields created by you do not meet your requirements, you can delete them permanently. Deleting custom fields will also delete data associated with it. In contrary to delete option, you can also hide specific field, so that it is not used by other users.

Follow few simple steps to delete custom fields

1. Hover your mouse pointer to the right of your custom field

2. Click on Trash Icon

In the alert message click **Yes**

Notes! You can only delete custom fields. Default fields can't be deleted

Hiding Fields

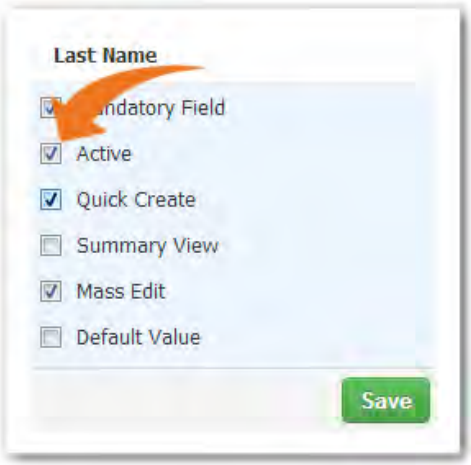
This feature enables you to hide fields, so that they are not used by users in *Prism SalesPRO CRM*. This has an advantage over delete field option because hiding fields will not delete data associated with it and hidden fields can be restored when required.

Follow few simple steps to hide fields

1.Click pencil icon next to your desired field

2. It brings up a pop-up that has set of options that can be configured on selected module

3. Uncheck the **Active** checkbox to hide specific field

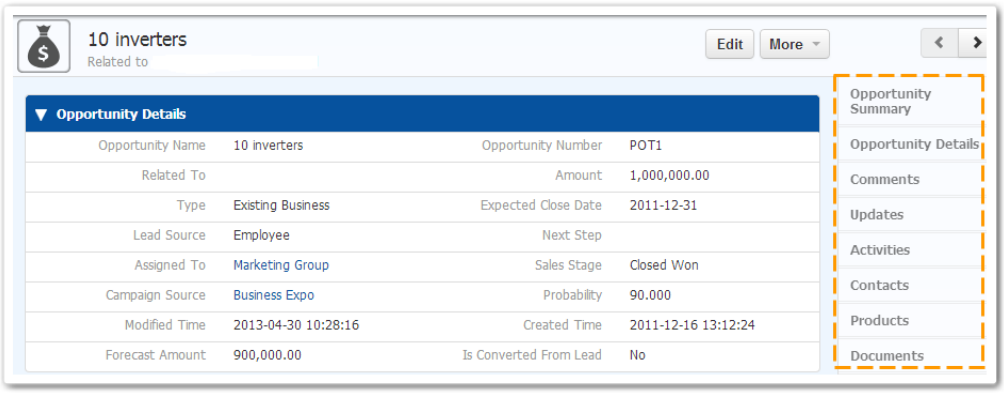


4. Click **Save** to update changes

Notes! You can hide both custom and default fields

Arranging Related Tabs

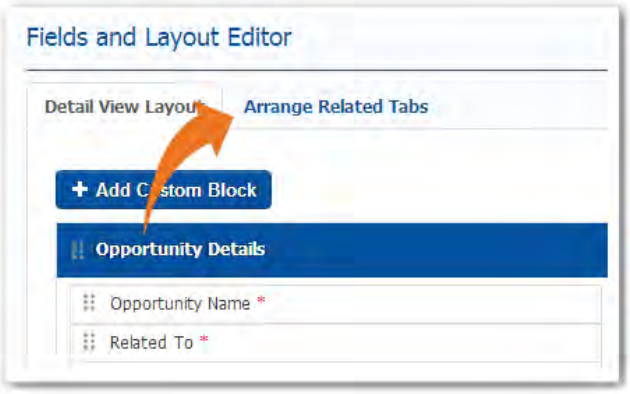
Related tabs are the modules that are directly or indirectly related to parent module. The idea is to organize data and project information at one place and reduce clicks. You can view related tabs of a parent module in detail view of selected record in any module.



This feature enables you to configure related tabs list according to your requirements. You can either rearrange the tabs or disable them.

Follow few simple steps to configure related tabs

1. Click **Arrange Related Tabs** tab in Fields and Layout Editor



2. To rearrange related tabs, click on desired module and drag it to selected location among other modules

3. To remove related tab, click Close icon to the right of any module

4. Select modules from **Select Module To Add** field to add them back to list

5. Click **Save** to update changes

Making Fields Mandatory/Non-mandatory

Mandatory fields are fields that you should fill in. You cannot create or import records without filling or mapping mandatory fields. You have complete power over fields across modules in *Prism SalesPRO CRM*. You can make desired fields mandatory or non-mandatory according to your requirements. Here's how to make desired fields mandatory

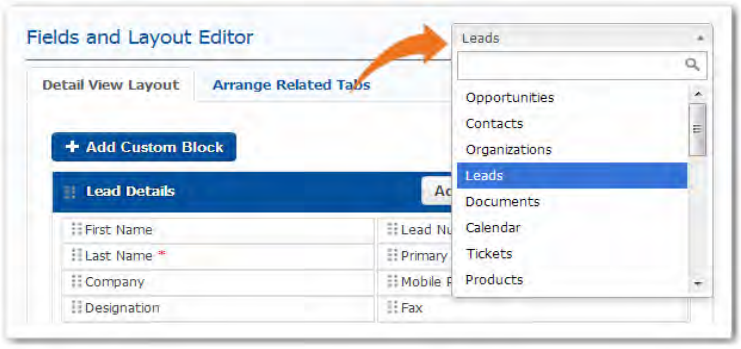
1. Click ⚙ gear icon in the top right corner

2. Click **CRM Settings**

3. Click 'Studio' drop-down in the left

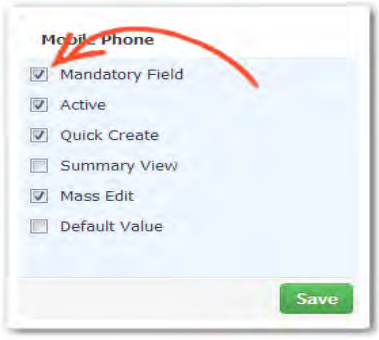
4. Click **Edit Fields**. You can click on pin icon next to it to add a shortcut to your settings home page

5.Select a module from the drop-down in top-right



6. Hover your mouse pointer over desired field and click on pencil icon next to it. Say **Mobile Phone** field in Leads module

7. Now enable the **Mandatory Field** checkbox to make it mandatory



8. Click **Save**

9. To make any field NON-MANDATORY, follow same procedure up to #6. In step #7, disable the checkbox **Mandatory Field** to make it non-mandatory

Notes!

1.You cannot make few fields non-mandatory. Eg: Last Name in Contacts module. These fields are made mandatory to establish relation between modules in *Prism SalesPRO CRM*

7. Module Manager

What is a module manager?

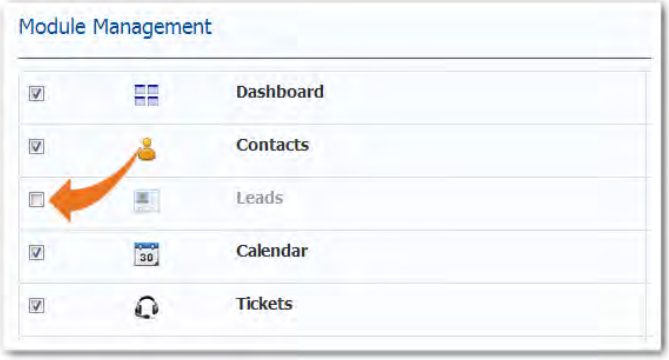
Prism SalesPRO CRM includes over 20 modules covering Sales, Support, Marketing, Inventory, Projects, Calendar and many more. **Module Manager** gives you the flexibility to enable, disable and configure settings of different modules available in *Prism SalesPRO CRM*.

Deactivating Module(s)

Module Manager displays the list of all modules available in your *Prism SalesPRO CRM* account. You can disable the modules that doesn't meet your business requirements by un-checking the checkboxes beside them. Unlike Profiles, if modules are disabled in Module Manager, they will not be available for use for all users across your *Prism SalesPRO CRM* account. However, you can easily enable the modules to bring them back in action by clicking on the checkbox beside that module.

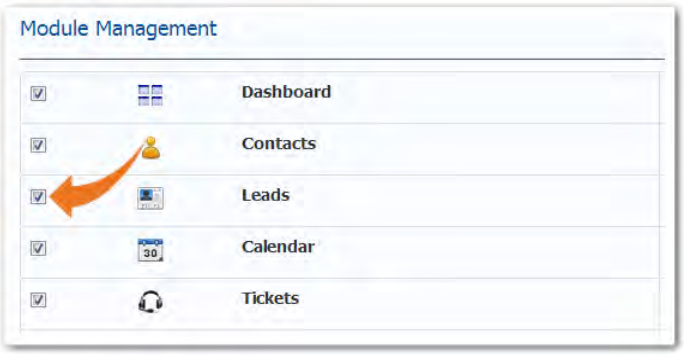
Follow few simple steps to disable modules in *Prism SalesPRO CRM*

1. Click gear icon in upper right corner
2. Click **CRM Settings**
3. Click 'Studio' drop-down in the left
4. Click **Module Manager**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Uncheck the checkbox next to specific field to disable it



Activating Modules

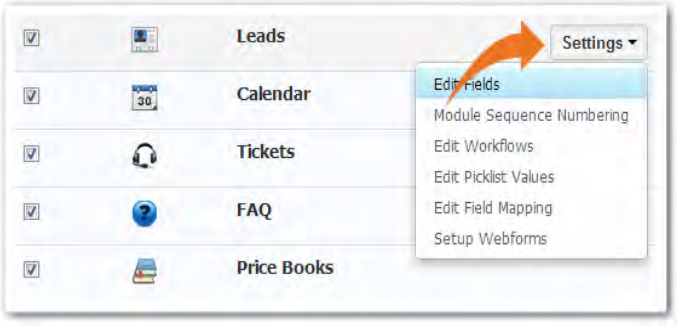
If you've ever decided to bring deactivated module into action again, you'll have to simply enable the checkbox beside that module.



Note! If you want to limit users' access to modules, you can use **Profiles** in the 'Users Management' section under Settings

Configuring Modules

This feature enables you to configure settings related to modules in *Prism SalesPRO CRM*. The key preferences with respect to the modules can be configured right through Module Manager. Settings that can be configured in Module Manager are illustrated below.



The wide variety of options include :

1	**Edit Fields**	Navigates you to Fields and Layout Editor where you can configure fields of selected module
2	**Module Sequence Numbering**	Navigates you to Customize Record Numbering feature where you can modify default record numbering of selected module
3	**Edit Workflows**	Navigates you to Workflows feature where you can set up new workflows on selected module
4	**Edit Picklist Values**	Navigates you to Picklist Editor where you can customize picklist fields of selected module
5	**Edit Field Mapping**	Exclusively for Leads. Navigates you to Lead Mapping feature where you can map fields before converting leads

8. Picklist Editor

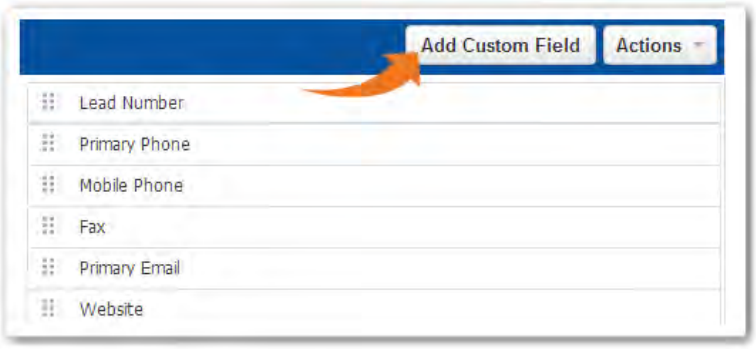
What is a Picklist Editor?

Picklist is a drop-down field with list of options available, within which, only one option can be selected. For instance, **Lead status** in **Leads module**. **Picklist Editor** is used to configure picklist values in different modules. It enables you to add a new values, rename, delete or rearrange existing picklist values. Picklist values vary across roles — users under a role can only access picklist values assigned to that role.

Creating a Custom Picklist Field

You can create a custom picklist field with desired set values on a selected module. While creating records, select a value from the picklist to have it automatically inserted in the field.
Follow few simple steps to create a custom picklist field

1. Click gear icon in the top right
2. Click **CRM Settings**
3. Click 'Studio' drop-down in the left
4. Click **Edit Fields**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Now click on **Add Custom Field** button in the right



6. In the create picklist field popup, provide picklist field name and values

a. Select field type as Picklist

b. Provide a label to your picklist field

c. Provide values to your picklist field in the text space provided

d. Leaving the checkbox unchecked will display your picklist across all users irrespective of roles; on the contrary, enabling the checkbox gives you the flexibility to vary picklist fields across roles.

Working with Picklist Fields

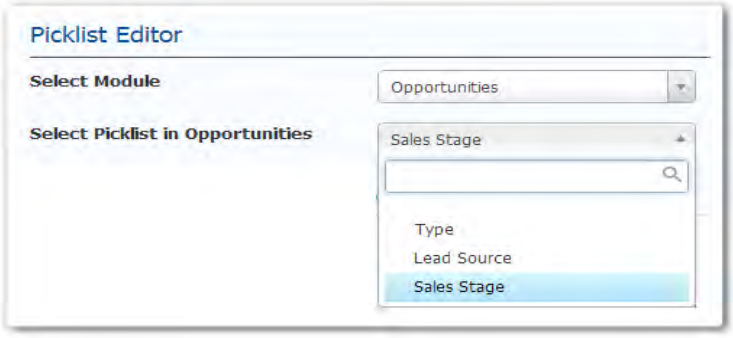
You can perform a wide variety of operations on picklist fields like adding new values to existing picklist field, modifying, deleting, rearranging existing values of a picklist field. Additionally, you can also assign roles on selected picklist values.

Follow few simple steps to configure picklist fields

1. Click gear icon in the top right corne
2. Click **CRM Settings**
3. Click 'Studio' drop-down in the left
4. Click **Picklist Editor**. You can click on pin icon next to it to add a shortcut to your settings home page

Getting Started

To customize picklist fields, you'll need to select desired [Module] from Select Module dropdown (ex:Leads, Contacts, etc). Consequently, Select Picklist in [Module]dropdown will display all picklist fields available for that module. This drop-down can be used to select the desired picklist field to perform global actions.



Rearranging picklist values

This feature enables you to modify the sequence of picklist values in a given picklist field. You can rearrange the values according to your requirements.

Follow few simple steps to rearrange picklist values

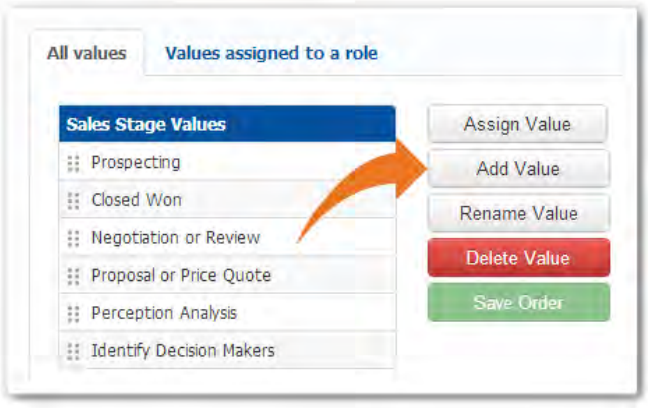
1. Select a module and desired picklist field
2. Click, drag and drop desired values
3. Click **Save Order**

Adding New Value(s)

Prism SalesPRO CRM enables you to create new picklist values in addition to existing values. After the custom picklist value(s) are created, they will be available for selection in respective module.

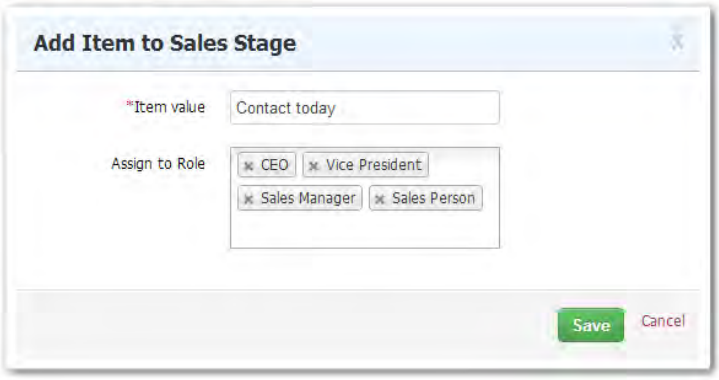
Follow few simple steps to add new picklist values

1. Select a module and desired picklist field
2. Click **Add Value** to add a custom picklist value



3. In the popup, provide desired name in **Item Value** field

4. Select desired role(s) from **Assign to Role** drop-down to grant them access to new picklist value



5. Click **Save**

Notes! Roles are not available for selection for non-role based picklist fields as values are displayed across all users in *Prism SalesPRO CRM*

Editing Existing Values

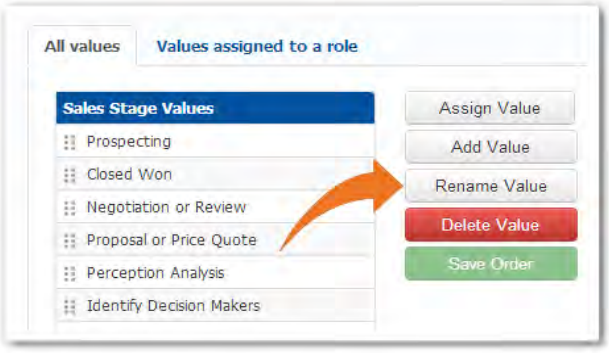
This feature helps you to edit existing picklist values in the selected picklist field.

Follow few simple steps to edit existing values

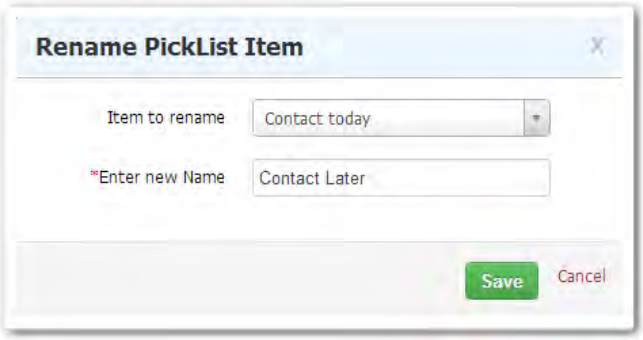
1. Select a module and desired picklist field

2. Select desired picklist value you wish to edit

3. Click **Rename Value**



3. In the popup, provide new label in **Enter New Name** field



4. Click **Save**

Deleting Existing Values

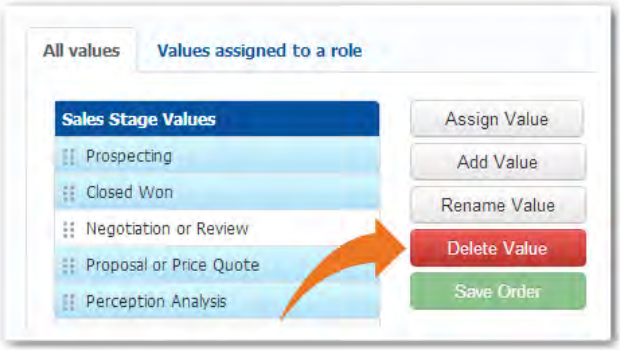
This feature helps you to delete existing picklist values in the selected picklist field. It also helps you to select multiple values and delete them all in one shot.

Follow few simple steps to delete picklist values

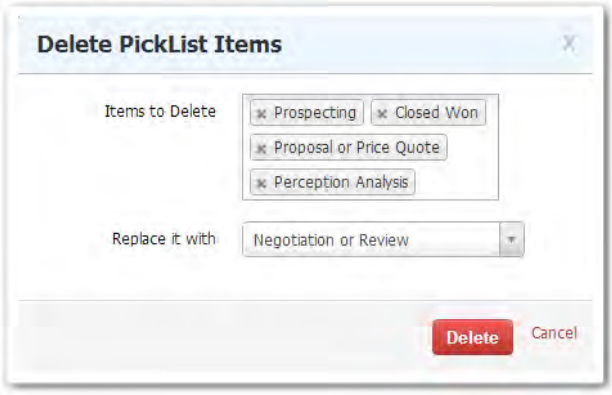
1. Select a module and desired picklist field

2. Select desired picklist values you wish to delete. To select multiple values, press and hold Ctrl key (Command key in Mac) and click on desired picklist values

3. Click **Delete Value** to delete selected values



4. Select a value in **Replace it with** field to transfer responsibilities. The selected field will show up in place of deleted value(s).



Assigning Roles

Prism SalesPRO CRM gives you the flexibility to grant or revoke access to picklist values through Picklist Editor. When you assign or disable picklist values to a selected role, changes will be affected across all users in that role.

Assigning Values to selected role(s)

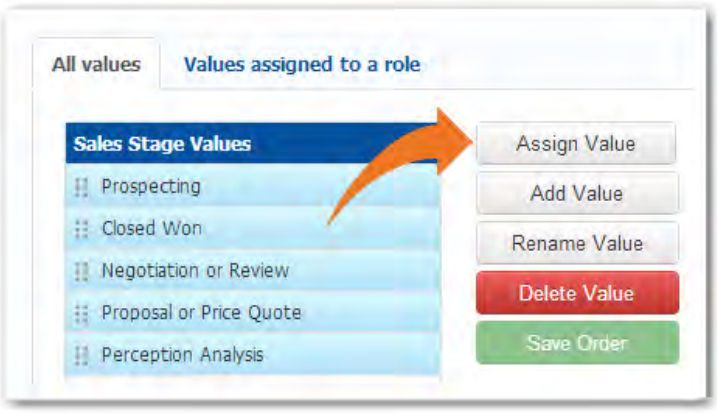
This feature enables you to assign multiple picklist values to multiple roles in one shot. When you assign values to a role, all users under that role will be able to access the picklist values.

Notes! Neither **Assign Value** button nor **Values assigned to a role** tab are available for non role based picklist fields

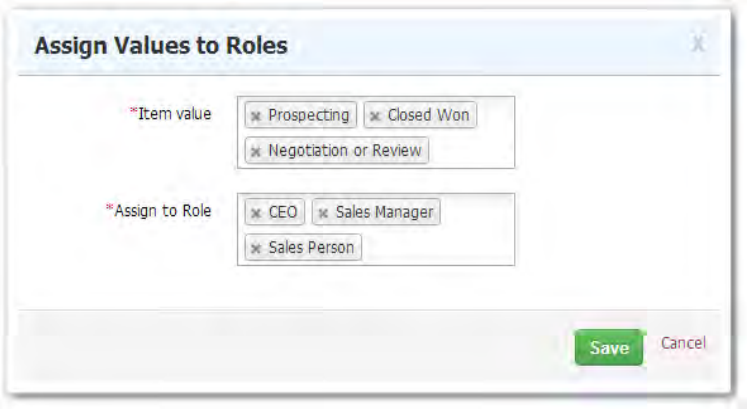
Follow few simple steps to assign values to role(s)

1. Select a module and desired picklist field

2. Select desired picklist values you wish to assign to selected role(s). To select multiple values, press and hold Ctrl key (Command key in Mac) and click on desired picklist values



5. Select role(s) from **Assign to Role** drop-down to grant them access to selected values



Values assigned to a role

The tab **Values assigned to a role** is displayed for all role based picklist fields in Picklist Editor. This feature enables you to view available picklist values against the selected role.

Additionally, this feature also gives you the flexibility to revoke access to selected values under a role. The values in blue are available for all users across selected role. Click on desired value(s) to disable it. The colour code grey represents that value is disabled for the selected role. You can click on disabled values to enable them back.
From the screenshot below, three values: Word of Mouth, Conference, Direct Mail are disabled for Sales Manager role

To update changes, click **Save.**

9. Picklist Dependency Setup

What is a Picklist Dependency Setup?

Picklist dependency setup offers you a seamless way of selecting only desired values from the picklist fields. You'll need to set-up dependency between two picklist fields (source and target picklist fields). By selecting a value in source picklist field, you'll have complete control over the target picklist fields.

For instance, we will consider a real time example. I have two different fields in Contacts Module. Football Team - source field, and Football Players- target field. When a value is selected in Football Team field, only players related to the selected team should be displayed in Football Players field. Now let's begin.

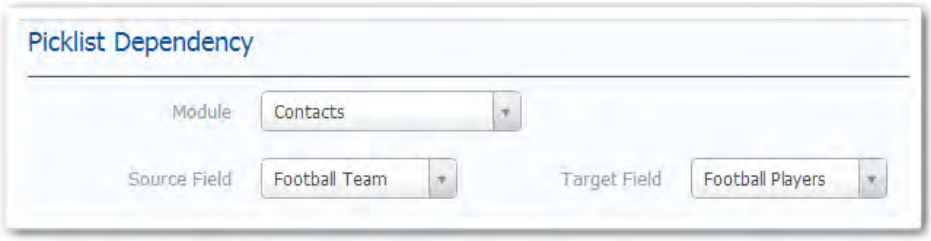
Configuring Picklist Dependency

Before we set up picklist dependency, we'll have to specify module, source field, and target field. Entire process is made simple and straight forward.
Follow few simple steps to setup picklist dependency

- Click gear icon in the top right
- Click **CRM Settings**
- Click 'Studio' drop-down in the left

Click **Picklist Dependency Setup**. You can click on pin icon next to it to add a shortcut to your settings home page

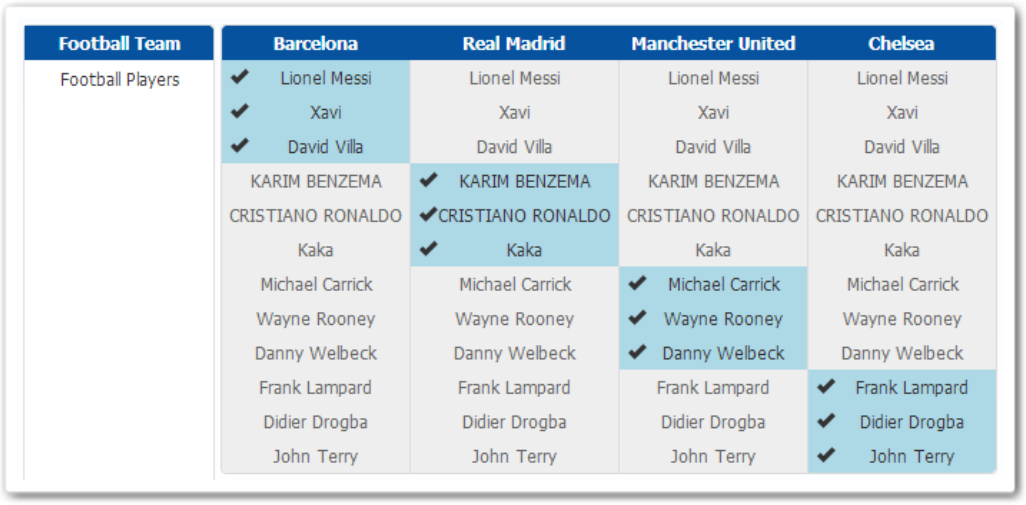
- Select a module, source field, and picklist fields from the dropdown.



6. All available values in source picklist field and target field are displayed. You can view all source picklist values in header section.

Football Team	Barcelona	Real Madrid	Manchester United	Chelsea
Football Players	✔ Lionel Messi	✔ Lionel Messi	✔ Lionel Messi	✔ Lionel Messi
	✔ Xavi	✔ Xavi	✔ Xavi	✔ Xavi
	✔ David Villa	✔ David Villa	✔ David Villa	✔ David Villa
	✔ KARIM BENZEMA	✔ KARIM BENZEMA	✔ KARIM BENZEMA	✔ KARIM BENZEMA
	✔ CRISTIANO RONALDO	✔ CRISTIANO RONALDO	✔ CRISTIANO RONALDO	✔ CRISTIANO RONALDO
	✔ Kaka	✔ Kaka	✔ Kaka	✔ Kaka
	✔ Michael Carrick	✔ Michael Carrick	✔ Michael Carrick	✔ Michael Carrick
	✔ Wayne Rooney	✔ Wayne Rooney	✔ Wayne Rooney	✔ Wayne Rooney
	✔ Danny Welbeck	✔ Danny Welbeck	✔ Danny Welbeck	✔ Danny Welbeck
	✔ Frank Lampard	✔ Frank Lampard	✔ Frank Lampard	✔ Frank Lampard
	✔ Didier Drogba	✔ Didier Drogba	✔ Didier Drogba	✔ Didier Drogba
	✔ John Terry	✔ John Terry	✔ John Terry	✔ John Terry

7. Now pick desired target field values under corresponding source field values(headers).



Football Team	Barcelona	Real Madrid	Manchester United	Chelsea
Football Players	✔ Lionel Messi	Lionel Messi	Lionel Messi	Lionel Messi
	✔ Xavi	Xavi	Xavi	Xavi
	✔ David Villa	David Villa	David Villa	David Villa
	KARIM BENZEMA	✔ KARIM BENZEMA	KARIM BENZEMA	KARIM BENZEMA
	CRISTIANO RONALDO	✔ CRISTIANO RONALDO	CRISTIANO RONALDO	CRISTIANO RONALDO
	Kaka	✔ Kaka	Kaka	Kaka
	Michael Carrick	Michael Carrick	✔ Michael Carrick	Michael Carrick
	Wayne Rooney	Wayne Rooney	✔ Wayne Rooney	Wayne Rooney
	Danny Welbeck	Danny Welbeck	✔ Danny Welbeck	Danny Welbeck
	Frank Lampard	Frank Lampard	Frank Lampard	✔ Frank Lampard
	Didier Drogba	Didier Drogba	Didier Drogba	✔ Didier Drogba
	John Terry	John Terry	John Terry	✔ John Terry

Notes! Values in blue are selected and values in grey are unselected.

8. Click **Save**

Working

After successfully setting up picklist dependency, you can select a value in source field to view only corresponding values in target field. From the above example, upon selecting a specific team, we should be only able to see players representing that team.

We've deployed picklist dependency on fields in Contacts module. In the create view or edit view of a contact record, we will select a value in **Football Team** field; as a result, appropriate values will be displayed in **Football Players** field

This gives you the flexibility to explicitly select appropriate values and eliminates the scope for erroneous and inaccurate data.

10. Menu Editor

What is a Menu Editor?

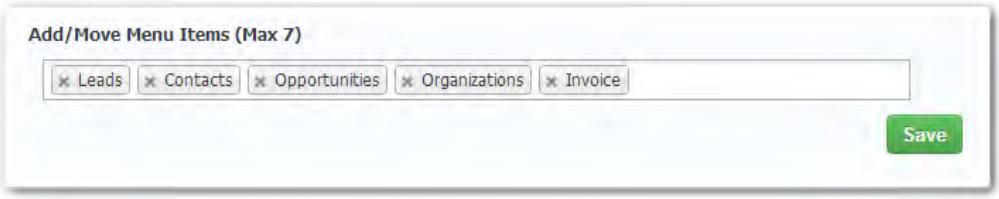
With the help of Menu Editor, you can have most frequently accessed *Prism SalesPRO CRM* modules on your menu bar. This will ensure easy navigation, and switching between different modules is easy. Also, you can shuffle their positions according to your requirements. However, the list of all available modules in *Prism SalesPRO CRM* are displayed under**All** dropdown

For instance, Sales reps frequently access sales related modules : Contacts, Leads, Invoices, etc. They can have frequently visited modules on menu bar to save time.

Follow few simple steps to configure desired modules on menu bar

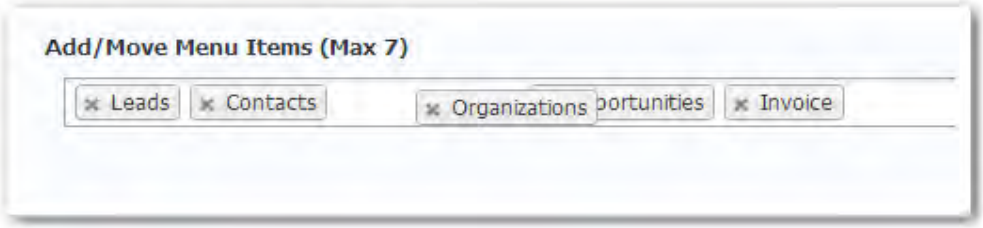
1. Click gear icon in the upper right
2. Click **CRM Settings**
3. Click 'Studio' drop-down in the left
4. Click **Menu Editor**. You can click on pin icon next to it to add a shortcut to your settings home page

All active modules in *Prism SalesPRO CRM* are available for selection. Select desired modules from list of modules



Notes! You can only select upto 7 modules to have on menu bar

5. Change the arrangement of the modules by dragging them among the other modules



6. Click **Save**

7. Refresh your page to see desired items on your menu bar.

11. Email Templates

What are email templates?

This feature enables you to create email templates and easily populate them while sending emails. You can design email templates according to your requirements. You can also include rich text, HTML content, Images, etc in your email templates. You can also design your own email templates for regular Newsletters, Monthly updates, Maintenance alerts etc.

Creating Email templates

Delight your customers by sending them customized email templates. You'll need to create and have email templates in your repository in order to select them while sending out emails.

Follow few simple steps to create new email template

1. Click **All** dropdown on the menubar
2. Click **Email Templates**
3. In Email Templates page, click **New Template** button
4. Enter template **Name** and **Description**
5. Select the Folder; Private-only for personal use and Public-used by all others users
6. Enter **Subject**—This will be populated as Subject of your Email
7. In the Select Field Type, Select the Module in **Step 1** and Select Field variables in **Step 2**

You can also include fields from the Modules in the email. The field variables, if selected, the field values will be populated from respective record and displayed in the email.

Organization Fields	Displays fields of Organization Module
Contacts	Displays fields of Contacts Module and related Organization Module
Lead Fields	Displays fields of Leads Module
User Fields	Displays user's information from My Preferences page
General Fields	Displays Current Date and Current Time

For instance,

Dear $contacts-last_name$,

Thanks for subscribing *Prism SalesPRO CRM* On-Demand. We are so glad that you are now member of *Prism SalesPRO*community. Please feel free to revert to us if you need any assistance

Regards,

$users-user_name$

The above email template will be populated as,

Dear Diana,

Thanks for subscribing *Prism SalesPRO CRM* On-Demand. We are so glad that you are now member of *Prism SalesPRO*community. Please feel free to revert to us if you need any assistance

Regards,

Prism SalesPRO

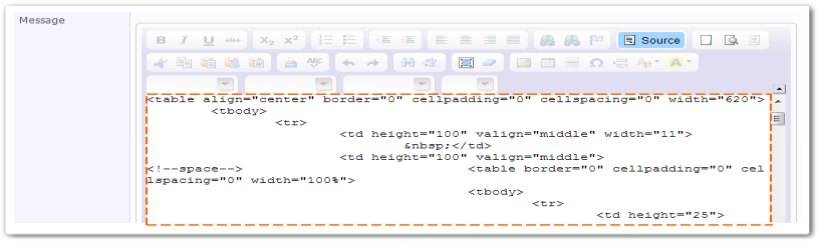
Inserting HTML content

Email Templates enables you to send emails to your customers. Hold on a sec! Will you let us send email templates we've spent time and money to develop? Yes we do. Apart from boring, routine, plain-text emails, you can also send colorful and visually appealing emails to thrill your customers. All you have to do is — integrating your pre-designed HTML content in your email template.

Follow few simple steps to integrate your html content in your email template

1. In create view or edit view of an email template, click **Source**

2. Paste your HTML content in the text space provided



3. Now click **Save!**

Notes!1. We strongly recommend you to click Save button and 'not' click **Source** button after pasting your HTML content

12. Company Details

You can personalize the application by uploading your Company logo and details to your *Prism SalesPRO CRM* service; as a result, company logo appears on your home page.Also, your company logo and address can be used in email templates and Inventory tools such as Quotes and Invoice, when exported to PDF files.

Steps to update your company logo and details

1. Click settings icon in the top right corner
2. Click **CRM Settings**
3. Click 'Templates' drop-down in the left
4. Click **Company Details**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click **Edit** button in the top right corner
6. To update your company logo, click **Choose File** button, browse and open desired file from your computer
7. You can also update company details in the fields provided
8. Click **Save**

Notes!
1. Recommended image size is 170X60 pixels.
2. Recommended image formats are .jpeg , .jpg , .png , .gif , .pjpeg , .x-png.

Go personalize your *Prism SalesPRO CRM* now!

13. Taxes

What are taxes?

Prism SalesPRO CRM gives you the flexibility to manage local and international tax rates through Tax Calculations. After the tax rates are defined, they will be available for selection in Invoices, Purchase Orders, Sales Orders and Quotes.

Product and Service Taxes
Product and Service taxes enable you to define Group Tax on list of products or services selected in Invoice, SO, PO, and Quote records.

It gives you the flexibility to manage following operations

Adding New Tax

This feature enables you to create national and international taxes.

Follow few simple steps to add a new tax

1. Click ⚙ gear icon in the upper right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Tax Calculations**
5. Click **Add New Tax** button under **Product & Service Taxes** block
6. Provide Tax Name(Alphabets) and Tax Value(Percentage)
7. Click **Save**

Editing Existing Taxes

This feature enables you to edit national and international taxes.

Follow few simple steps to edit existing taxes

1. Click ⚙ gear icon in the upper right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Tax Calculations**
5. Click pencil icon next to tax you'd like to edit
6. Update fields with desired values
7. Click **Save**

Enabling/Disabling Existing Taxes

This feature helps you to enable or disable existing taxes. All the tax values that are enabled in Tax Calculations will be available for selection in Products module. Also, the tax rates in Invoices, SO, PO, and Quotes will be calculated against taxes that are enabled in Tax Calculations. To be precise, the taxes, if disabled in Tax Calculations, they will be simply ignored and not used for calculating taxes.

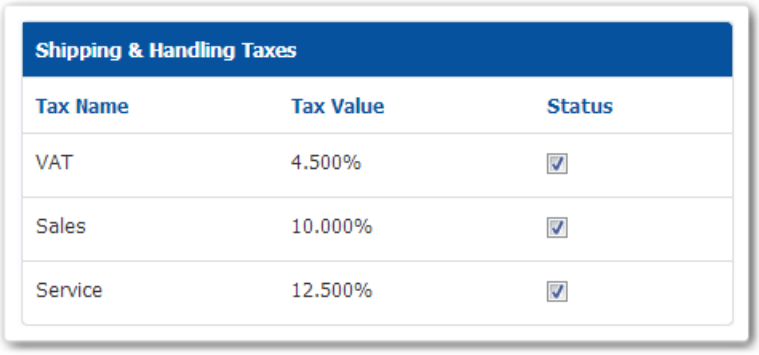
Follow few simple steps to enable/disable existing taxes

1. Click gear icon in the upper right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Tax Calculations**
5. Uncheck the checkbox under **Status** to disable specific tax
6. You can click on that checkbox again to enable the tax

Notes! Disabled taxes will not affect price in Invoice, Sales Orders, Purchase Orders and Quotes

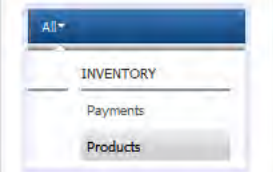
Shipping and Handling Taxes

Shipping and Handling Taxes enables you to define taxes that will incur on transporting a product or service. These taxes are basically calculated on Shipping and Handling Charges defined while creating Invoice, SO, PO, and Quote. Unlike **Product and Service Taxes**, Shipping and Handling Taxes do not respect the value that is selected in**Tax Mode**, ie., these taxes are same for both **Group** and **Individual** taxes.

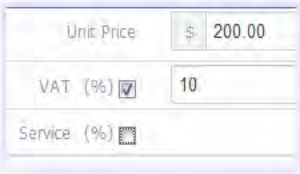


Individual Tax

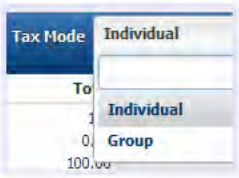
Prism SalesPRO CRM enables you to define tax rates on individual product. Individual Tax is product specific. To populate product specific tax while generating Invoice, SO, PO or Quotes.



Click **All** > **Products**



Enable desired taxes



Select Tax Mode as **Individual**

14. Inventory Terms & Conditions

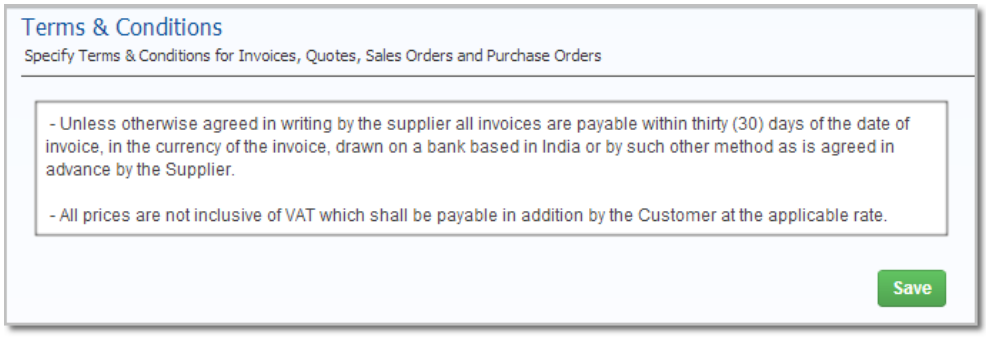
What are inventory terms & conditions?

This feature enables you to define inventory terms and conditions in the form of text that is automatically populated in inventory modules such as Invoices, Sales Orders, Purchase Orders and Quotes. This will help you to convey your terms and conditions explicitly. Having the terms and conditions text ready in inventory modules also helps you to populate the text in pdf templates sent to customers.

Getting Started

Prism SalesPRO CRM provides default text in Inventory Terms and Conditions feature. You can modify the text to match your business requirements.
Follow few simple steps to modify text in Inventory Terms and Conditions

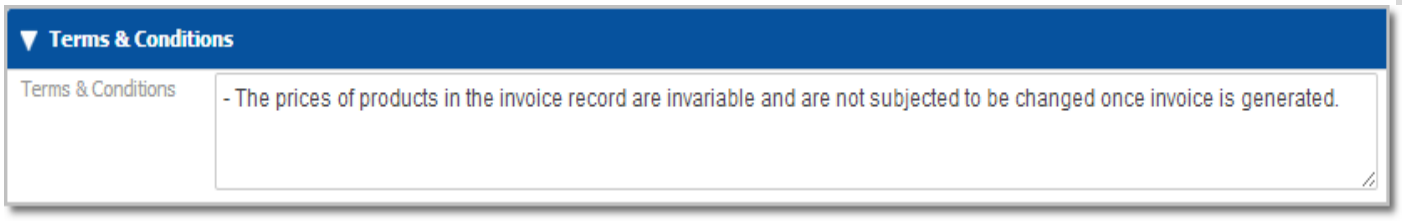
1. Click gear icon in the top-right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Inventory Terms and Conditions**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Modify the default text in the text-space provided
6. Click **Save**


Terms & Conditions
Specify Terms & Conditions for Invoices, Quotes, Sales Orders and Purchase Orders
- Unless otherwise agreed in writing by the supplier all invoices are payable within thirty (30) days of the date of invoice, in the currency of the invoice, drawn on a bank based in India or by such other method as is agreed in advance by the Supplier.
- All prices are not inclusive of VAT which shall be payable in addition by the Customer at the applicable rate.
Save

Working with Inventory Terms and Conditions

Inventory Terms and Conditions text is automatically populated in Terms & Conditions block in inventory modules: Invoices, Sales Orders, Purchase Orders and Quotes. However, you can modify the text from within individual inventory module record, too.

For instance, I am going to modify Inventory terms and conditions text from within my invoice record


Terms & Conditions
Terms & Conditions
- The prices of products in the invoice record are invariable and are not subjected to be changed once invoice is generated.

15. Announcements

What are announcements?

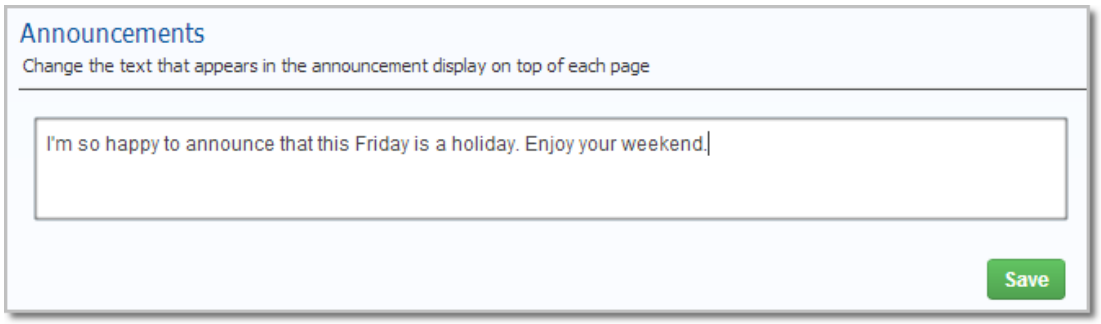
Prism SalesPRO CRM gives admin users the ability to create announcements that can be broadcasted across all users (Admin and non-admin users). You can view announcements below menu bar section in the top. In real-time scenario, Announcements can be used as message boards where users can share their topics of interest with all other users in *Prism SalesPRO CRM*.

Getting Started

You'll need the administration privileges to create announcements. Non-admin users can only view announcements created by administrators.
Follow few simple steps to create an announcement

1. Click gear icon in the top right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Announcement**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Compose your message in text space provided
6. Click **Save**

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)


Announcements
Change the text that appears in the announcement display on top of each page
I'm so happy to announce that this Friday is a holiday. Enjoy your weekend.
Save

Announcements in action

After successfully creating an announcement, you can view your it below the menu bar section on the top. The announcement also holds the name of the admin user that posted it. Non-admin users can only view the announcement.

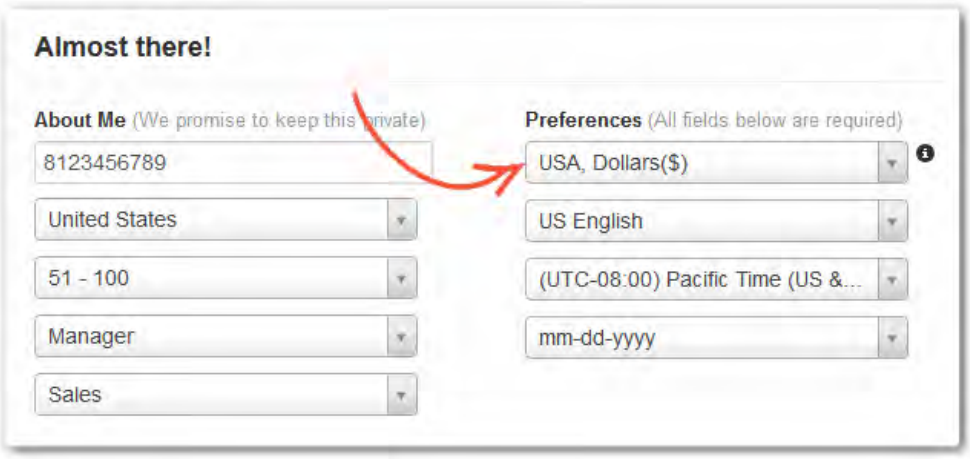
16. Currencies

What are Currencies?

This feature enables you to configure national and international currencies to help you in dealing business operations with your customers around the globe. You'll be asked to select your base currency at your first login, in startup page. The base currency is the currency against which exchange rates are generally quoted in a given country. For instance, INR in India, and USD in USA. The foreign currencies you'd set up in your *Prism SalesPRO CRM* account will be converted according to the exchange rates of base currency.

Getting Started

You'll need to configure base currency during your first login - in start up page

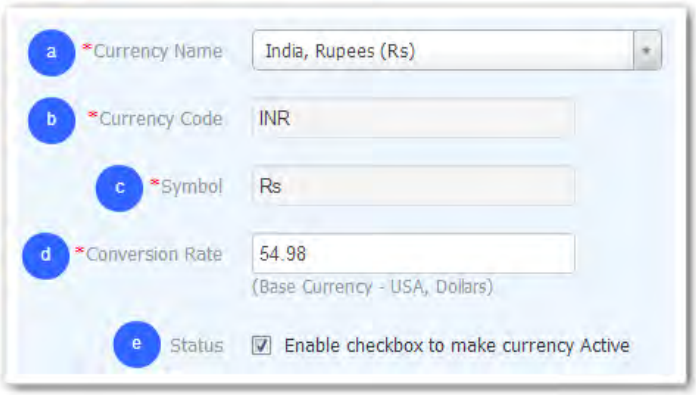


Adding new currencies

Besides base currency which is automatically added, you can also add new foreign currencies in *Prism SalesPRO CRM*. While the exchange rate of base currency is set to 1, you'll have to manually provide exchange rates for newly added currencies in accordance with your base currency.
Follow few simple steps to add new currencies

1. Click gear icon in the top right corner
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Currencies**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click **Add Currency**

In the create view of new currency, you'll need to fill up the following fields



a. Currency Name	Select desired currency from the drop-down
b. Currency Code	The currency code of the selected currency is automatically populated
c. Symbol	The symbol of selected currency is automatically populated
d. Conversion Rate	Provide conversion rate of selected currency in accordance with your base currency. For instance, 1 USD = 54.89 INR
e. Status	Enable the check-box to make currency active

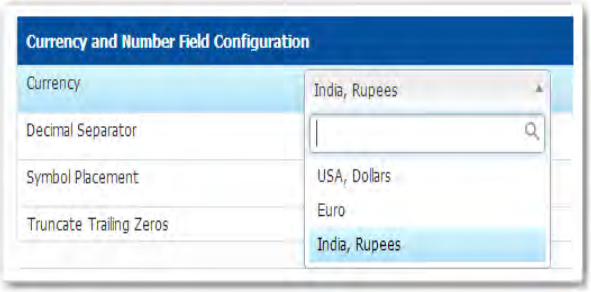
Configuring desired currency

You can also manage reports and other inventory operations in an entirely different currency other than base currency. *Prism SalesPRO CRM* gives you the flexibility to switch to a different currency; as a result, all currency fields will be updated according to selected currency. It is simply that currency fields are converted according to base currency value.

You can choose desired currency from **My Preferences** page; consequently, all currency values will be updated according to selected currency.

Follow few simple steps to configure desired currency

1. Click on your user name in the top right corner
2. Click **My Preferences**
3. In the 'Currency and Number Field Configuration' block, locate Currency field and select desired currency



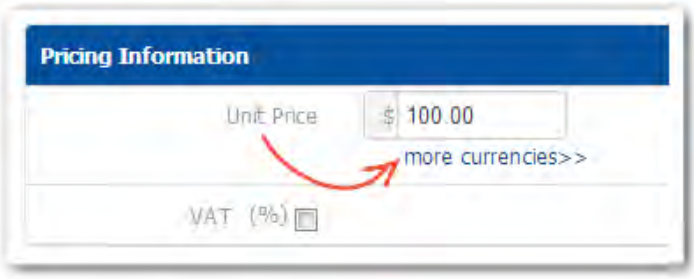
4. Click **Save**

Modifying Product Price

Products are sold across different countries with different price tags i.e, if product of US is to be sold in India, price of that product may or may not be decided on the basis of conversion rates. *Prism SalesPRO CRM* gives you the flexibility to configure product prices manually or populate prices according to conversion rates.

Here's how you do it

In the edit view or create view of desired product, click **more currencies** link under **Unit Price** field



In the **Product Price** popup, you can see, values are all updated according to conversion rates. However, you can modify them and have custom values in place by entering desired price values under **Price** tab.

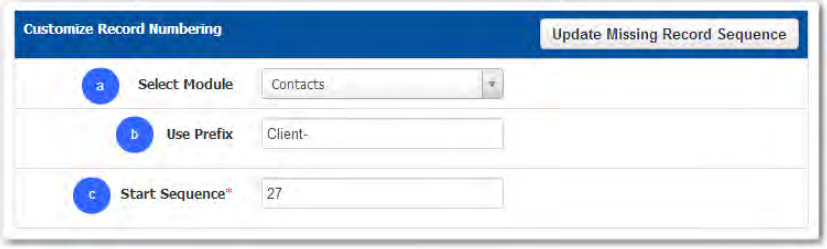
Now when you select this product while generating Invoice, Sales Order, Purchase Order or Quotes, you'll see the prices that are updated by you - not conversion rates

17. Customize record numbering.

This feature helps you to customize numbering of records according to your requirements. *Prism SalesPRO CRM* offers default numbering corresponding to every module in *Prism SalesPRO CRM*. We recommend you to customize your record numbering prior to inputting data in your *Prism SalesPRO CRM* account - because this feature doesn't affect the numbering of existing records.

Follow few simple steps to customize numbering of your records

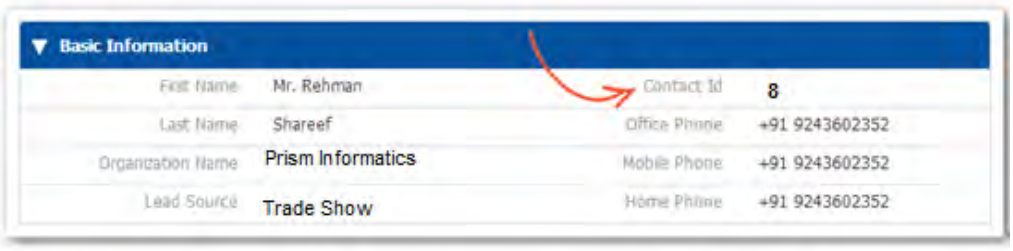
1. Click ⚙ gear icon in the top right corner
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Customize Record Numbering**. You can click on 📌 pin icon next to it to add a shortcut to your settings home page



a. Select Module	Select desired module to customize numbering of records in it
b. Use Prefix	Provide desired prefix. This will be automatically populated in the detail view of selected module > [Module] number field. Module can be Contacts, Leads, etc.,
c. Start Sequence	Provide the sequence where numbering should be started. This record numbers are updated in chronological order beginning from your start sequence number

5. Click **Save**

After successfully customizing record numbering, you can see that the records that are imported or created after the customization will automatically populate prefix and sequence number is updated chronologically.



18. Workflows

What are workflows?

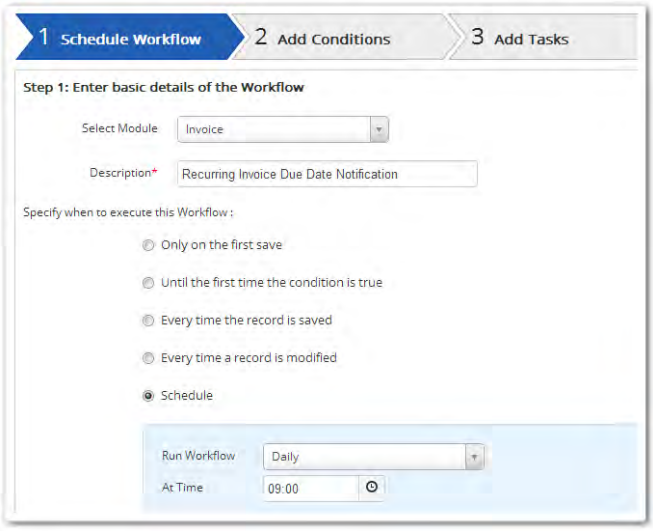
Workflows will streamline your business by automating operations like sending emails, creating activities, updating fields, etc. As tasks are performed automatically, you need not have to execute them manually.

Follow few simple steps to setup a workflow

1. Click gear icon icon in the top right
2. Click **CRM Settings**
3. Click 'Other Settings' drop-down in the left
4. Click **Workflows**. You can click on pin icon next to it to add a shortcut to your settings home page
5. Click **New Workflow**

Step 1: Scheduling workflow

You'll need to provide basic details that include selecting a module and scheduling workflow. **Workflows** gives you the ability to perform different operations on the selected module such as: sending an email, updating fields, creating a whole new record in another module, creating an event or todo, etc. This answers the question *why should we select a module here?*. We will discuss the actions that are triggered by the workflows in detail in Step-3.



You'll need to specify when would you like to run the workflow. Workflow running conditions are all predefined and you only have to choose the condition that suite your requirements.

1. **Only on the first save**- Triggers workflow on your first save ie., when you create a new record.
2. **Until the first time the condition is true**- Triggers workflow if your condition(Step-2) will be true. Once executed, your workflow will not trigger on the same record again. However, it will trigger actions on other records in the selected module.
3. **Every time the record is saved**- Triggers workflow every time you will save your record—including first save.
4. **Every time the record is modified**- Triggers workflow every time you edit and save your record—excluding first save.
5. **Schedule**-Triggers workflow on a certain date

Complicated? Umm, let me give you a few examples for a better understanding

Only on first save

For instance, I am Rahul, sales agent in ABC company. I manage to send a warm welcome note to new customers through email. I will create a workflow for this purpose and my workflow running condition will be **Only on the first save**. This will trigger workflow only when new record is created.

Until the first time the condition is true

Records with 'Sales Stage' equals to 'Closed Won' should be automatically assigned to me. This happens only once in the sales cycle of a record. For that reason, I will create a workflow and have the condition **Until the first time the condition is true**. Once the workflow is executed, it's not going to perform the same operation on that record again.

Every time the record is saved

When a deal is won, 5 % share of the total amount goes to the sales agent. I do not waste my time in calculations. I would rather create a workflow. This should execute every time record is saved; as a result, values will be automatically updated.

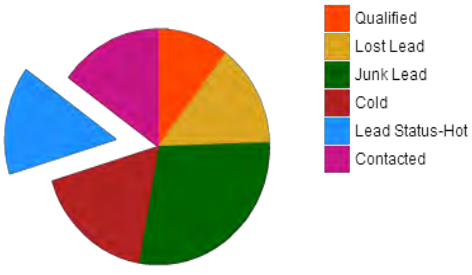
Every time the record is modified

I want *Prism SalesPRO CRM* to trigger me an email if someone modifies information in 'Amount' field in Opportunities module. I will create a workflow and have the condition **Every time the record is modified**. This workflow will execute every time edit+save operation will be performed on a record.

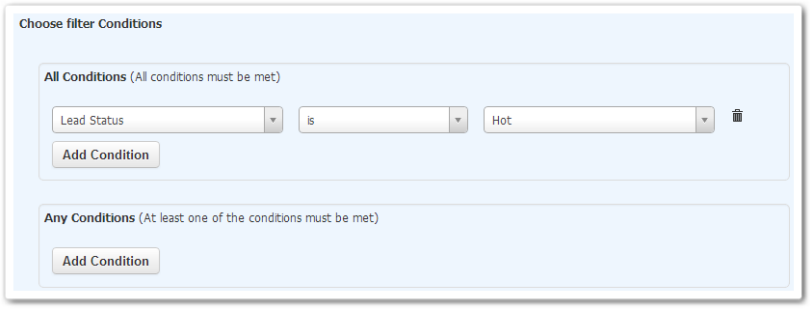
Adding Condition(s)

Workflows will be executed on the records in the selected module. More often, you might only need to perform operations on selected records in that module. This is where conditions will come into play. Workflow will only be executed on the records that satisfy the condition specified by you.

For instance, I would like to create a workflow on Leads module. I want the workflow to execute operations on records with 'Lead Status' equals 'Hot'. So, my condition will be Lead Status is Hot



You'll find two different options while defining conditions. The functionality of the conditions is described below with an example



1. **All Conditions :** Filters records based on AND condition.

For instance,

Condition 1

AND

Condition 2

AND

Condition 3

Displays the results if and only if ALL conditions are matched. If one condition is failed, other queries will not be executed.

2. **Any Conditions :** Filters records based on OR condition.

For instance,

Condition 1

OR

Condition 2

OR

Condition 3

Displays the results if at-least ONE condition is matched. If one query is failed, other queries will be executed.

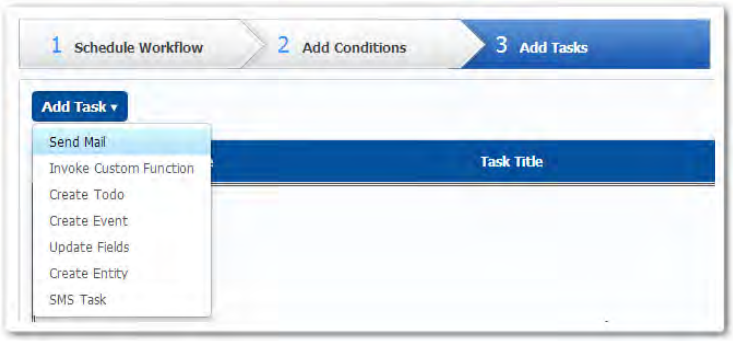
Notes!

1.By default, AND condition is enabled between **ALL conditions** and **ANY conditions**. This will help you in grouping the two conditions, altogether.
2.You can provide existing or custom criteria while defining conditions.
3.You can define multiple conditions for a workflow by clicking on **Add Condition** button.

After defining conditions, click **Next**

Adding Task(s)

The actions that should be executed with the help of workflows can be configured through tasks, while previously defined steps are just to provide directions and inputs.
Click Add Task button and select desired task



1. **Send Mail**- To send an email notification
2. **Invoke Custom Function** - To update target fields of records in a module when actions are performed on source field in a different module
3. **Create Event**- To create a new calendar event
4. **Create To do**- To create a new calendar task
5. **Update fields**- To updates field(s) of selected module
6. **Create Entity**- To create or update records when conditions are satisfied on parent record
7. **SMS Task**- To send SMS notification

19. Customer Portal

What is Customer Portal?

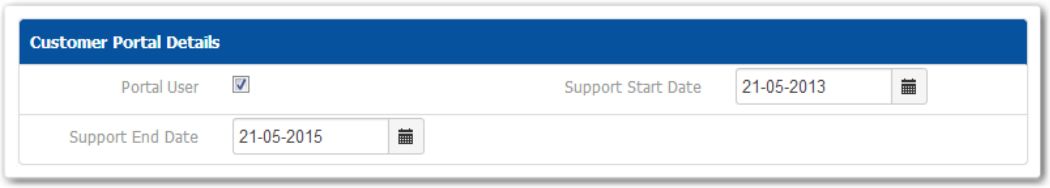
Customer Portal helps you deliver value to your customers. The self-service channel offers your customers the ability to generate tickets and refer to faqs. In addition, you can also share Documents, Products, Projects, Invoices, and Quotes etc

Getting Started

You can provide Customer Portal access to selected number of customers in Contacts module.

Follow few simple steps to grant Customer portal access

1. Click **Contacts** tab. You can find it under **All** dropdown on menu bar
2. In the Create view of new contact record, or edit view of existing record, enable the check-box **Portal User**
3. Provide Support Start Date and End date; your customers will only be able to login within span of Support Start and End dates



4. Customer Portal login URL, User Name and Password will be emailed to your customer automatically.

Note!
1.Make sure you have configured your Outgoing Server properly.
2.Emails will not be sent to your Contact if **Email Opt Out** field is enabled.
3.Your customer can only log into customer portal if the current date falls within the range of **Support Start Date** and **Support End Date**.

Personalizing Email Template

If customer portal access is granted, an email notification will be sent to your customers. This email contains default HTML template designed by PrismSalesPRO. However, you can personalize the email template according to your specifications.

Follow few simple steps to personalize email template

1. Click **All** dropdown
2. Click **Email Templates**
3. Click **Customer Login Details** template
4. Click **Edit** to modify the template according to your requirements
5. After modifications, click **Save**

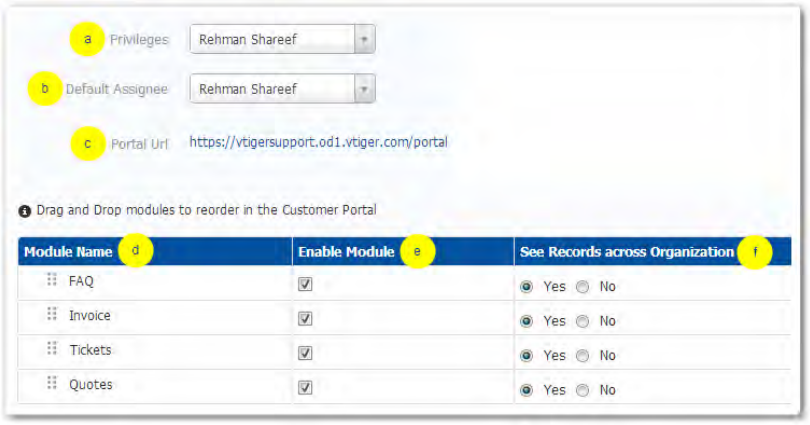
Notes!
1. User ID: $login_ name$
2. Password: $password$
3. URL

Configuring Customer Portal

With Customer Portal Settings, you can restrict or grant your customers the ability to view modules, fields and data. In addition, you can also configure default ticket assignee; as a result, tickets generated from Customer Portal will be assigned to selected user.

Follow few simple steps to configure Customer Portal Plug-in

1. Click ⚙ gear icon in the top right
2. Click **CRM Settings**
3. Click 'Other Settings' dropdown in the left
4. Click **Customer Portal**. You can click on 📌 pin icon next to it to add a shortcut to your settings home page
5. Set up Customer Portal according to your Organization's requirements



a. Privileges	To grant your customers the privileges that the selected user has on modules and fields in *Prism SalesPRO CRM*
b. Default Assignee	Select an user to automatically assign tickets raised by your customers through customer portal
c. Portal URL	This is where your customers will login to access customer portal
d. Module Name	Displays the list of all modules that can be viewed by your customers
e. Enable Module	Enable the check-box to make the corresponding module available to your customers
f. See Records Across Organization	Selecting the radio button **Yes** enables your customers to view records of other customers in his / her Organization. **No** enables your customer to view only his / her records

6. Click **Save**

Notes! Please make sure that you do not select any admin user from the **Privileges** drop-down

(adapted from vtiger CRM 6.0.0Beta© 2004-2013)

Customer's point of view

Using the details like Customer portal URL, username, and password, your customers can easily log into customer portal. Not just that, *Prism SalesPRO CRM* also offers them flexibility to enjoy following benefits through Customer Portal.

Resetting Password

Your customers can set up desired password after successfully logging into the Customer Portal. Follow few simple steps to update password

1. Click **My Settings**. You can find this link in the top right
2. In the popup, provide the password details
3. Click **Save**

Generating Tickets

If your customers have any issues with respect to the Product that was purchased from you, they can report issues by creating a Ticket (Case) through Customer Portal.

Managing Tickets

1.Click Tickets tab

2.Click Show drop-down to Sort the existing tickets by Status.

3.Click Search button to search for existing tickets

Creating New Ticket

1.Click on New Ticket to start creating a new case or an issue.

2.In the Create Ticket view, fill in the necessary information

3.Click Save

Note!
1. The tickets generated by customers will be populated in Trouble Tickets module in *Prism SalesPRO CRM*
2. In the detail view of a case, customers and ticket owner can communicate through comments
3. Email notifications will be sent to ticket owner and contact when Ticket is created, Comments are exchanged or Ticket is closed.
4. You can also attach files to the system. These files can be viewed in Documents section of detail view of Trouble Ticker record
5. After the issue is resolved, your customer can Close the ticket by clicking on **Close this ticket** link. Ticket owner will also have powers to close the ticket by changing the **Status** to **Closed**

Accessing Shared Records

Customer Portal is a great media to share information with your customers as they can view Invoices, Quotes, Products, Documents, Contacts, Organizations, Assets and Projects. Customers can view records directly related to them or records related to other contacts in same Organization.

Note!
1. Click Products tab to view the products that are directly related to the Contact and Products associated with Quotes and Invoices.This is same for Services also.
2. Click Documents tab to view the list of documents that are related to the Contact. Click on the file name to download the attachment.
3. Click Invoice subject download the PDF version of the Invoice.
4.Click Projects tab > Project detail view of a project record, click on **Raise Ticket** button to generate a new case if you have any issues with respect to Project record.

20. Account Settings

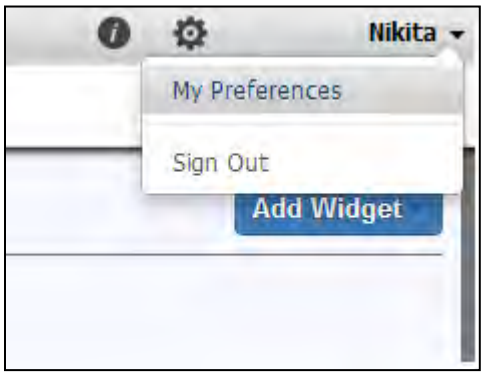
1. Changing your Password.

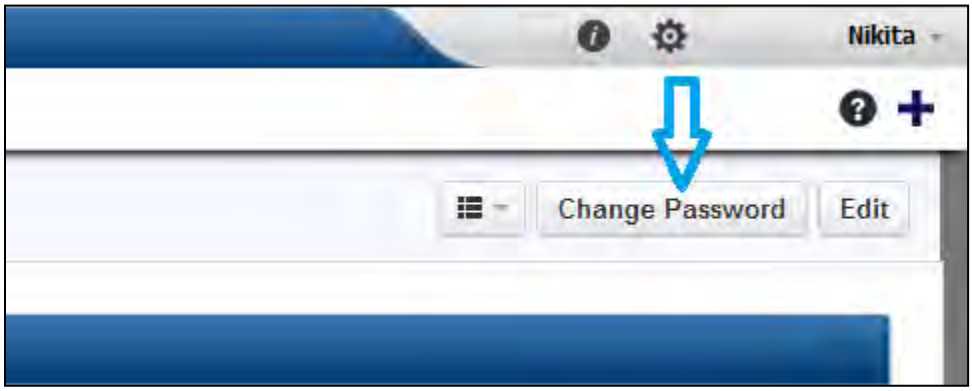
Follow these simple steps to change your *Prism SalesPRO password:*

1. Login with your current credentials.

2. Click your username in the top right corner.

3. Select “My Preferences.”





4. Click “Change Password” button.

Users with admin privileges can reset the password of non-admin users.

Here's how to change password of non-admin users

1. Click gear icon in the upper right.
2. Click **Manage Users**
3. Click on desired user name(non-admin) from the list of users
4. Now click **Change Password** in the top right
5. Provide password and click **Save.**

My Preferences will help you to configure your personal information.
Few simple steps to update personal information of the user

1. Click on user name in the upper right
2. Click **My Preferences**
3. Update the following details and click **Save**

User Login & Role

Prism SalesPRO CRM allows users to modify Primary Email, Name, and Default Lead view. Also, this section will help administrators to assign roles to individual users.

Primary Email	Specify primary email of the user
First Name	Specify first name of the user
Last Name	Specify last name of the user
Default Lead View	
Role	To assign roles to individual users. Only displayed for admin users

Calendar Settings

With calendar settings, you can configure your calendar like the way you wanted it to be. You can set up Reminder Interval, Default calendar View, Time Zone and many more.

Reminder Interval	Set-up time interval for event reminder popup to appear again after it is closed
Starting Day of the week	Set-up your start day of week. For Instance, If your working day starts on Monday, you can select Monday
Default Call Duration	To automatically update **End Date and Time** for calls. So, you need not have to enter End Date and Time manually

Other Event Duration	To automatically update **End Date and Time** for all events other than calls. So, you need not have to enter End Date and Time manually
Default Calendar View	*Prism SalesPRO* supports different views in Calendar module. Select preferred view from the drop-down to make it default view
Date Format	Select desired date format
Calendar Hour Format	Select either 12 hour or 24 hour time format
Day Starts at	Customize your working hour on calendar view
Time Zone	Select desired time zone

Currency and Number Field Configuration

While managing inventory modules like Invoices, Quotes, Sales and Purchase Orders, you will need to have a valid currency format, digit and decimal separator, symbol placement etc. You can configure currency as per the requirement.

Currency	Select desired currency for the drop-down. However, the values will be saved according to base current rates
Digit grouping pattern	Select digit group separator that is often used when displaying large numbers, to make them easier to read.
Decimal Separator	Select a decimal point from drop-down to use between the integer and the fractional parts of a decimal
Symbol Placement	Select a value from drop-down to have currency symbol before or behind the currency value
Number of Currency Decimals	Select the number of decimals you would like to have after a currency value
Truncate Trailing Zeros	Enable the check-box to drop the values after the decimal point

More Information

You can update your personal information like phone number, email, signature etc

Title	Specify designation of the user
Fax	Specify fax number of the user
Department	Specify the department of the user

Other Email	Specify the other email of the user
Office Phone	Specify office phone number of the user
Secondary Email	Specify secondary email id of the user
Mobile Phone	Specify mobile phone number of the user
Reports to	Select the user(Subordinate) to whom the user reports to
Home Phone	Specify the home phone number of the user
Secondary Phone	Specify the secondary phone number of the user
Signature	Specify the signature in the text area. Your signature will be automatically embedded along with email body.
Documents	
Internal Mail Composer	Enable the check-box to see *Prism SalesPRO* CRM's built-in email composing window when you click on email id of records in *Prism SalesPRO* CRM
Theme	Select desired theme from drop-down
Language	Select desired language from the drop-down
Default Record View	Choose between viewing Summary view or Detail View when you click to view a record.

User Address

You can update address details of the user like city, state, country, etc.

Street Address	Specify street address of the user
Country	Specify user's country name
City	Specify name of the city where user lives
Postal Code	Specify postal code of user's address
State	Specify name of the state where user lives

User Photograph

Click on **Choose file**, browse for the user's photograph and click **Save** to upload.